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### Financial Overview Form

In order to take full advantage of your time and provide you with the best information available for your consultation, please provide the following information. This information will not be shared with anyone and is completely confidential.

#### Personal Information

Name \_\_\_\_\_ Date of Birth \_\_\_\_\_

Place of Work \_\_\_\_\_ Type of Work \_\_\_\_\_

Annual Gross Income \_\_\_\_\_ Monthly Take Home Pay \_\_\_\_\_

Hobbies / Other Interests \_\_\_\_\_

Spouse's Name \_\_\_\_\_ Date of Birth \_\_\_\_\_

Place of Work \_\_\_\_\_ Type of Work \_\_\_\_\_

Annual Gross Income \_\_\_\_\_ Monthly Take Home Pay \_\_\_\_\_

Hobbies / Other Interests \_\_\_\_\_

Daytime Phone \_\_\_\_\_ Alternative Phone \_\_\_\_\_ Email \_\_\_\_\_

Address \_\_\_\_\_

Street	City	State	ZIP
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Are you attending (or have you attended) Financial Peace University? \_\_\_\_\_

#### Financial Information

How many dependants living at home? \_\_\_\_\_ Ages? \_\_\_\_\_

Do you rent or own your home? \_\_\_\_\_ Monthly payment \_\_\_\_\_ Est. home value \_\_\_\_\_

What is the total debt on your home? \_\_\_\_\_ Loan Terms \_\_\_\_\_

Any auto loans? \_\_\_\_\_ If so, how many? \_\_\_\_\_ Total amount owed? \_\_\_\_\_

Do you have a working monthly budget? \_\_\_\_\_ Do you save money on a regular basis? \_\_\_\_\_

Did you receive a tax refund last year? \_\_\_\_\_ If so, how much? \_\_\_\_\_

Do you currently contribute to retirement? \_\_\_\_\_ Do you have cash value or term life insurance? \_\_\_\_\_

Approximate total of all other debt (student/personal loans, credit cards, etc.) \_\_\_\_\_

What specific issues would you like to discuss during your consultation? \_\_\_\_\_

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