



# FINANCIAL ASSESSMENT QUESTIONNAIRE

1) What would you like to work on in our session today?

2) What are your expectations for the session?

3) What has recently happened that led you to seek help?

4) Are you behind on your? (Check those that apply)

Rent or house payments       Car payments       Other loan payments  
 Any other payments?

5) What areas would you like help with? (Check those that apply)

Setting Values & Goals       Cash Management       Gambling  
 Divorce & Money       Tenant Education       Kids & Money  
 Payday Loans & NSF Checks       Pre-marital Financial Counseling       Buying a Home  
 Starting Over After Bankruptcy       Saving for Financial Goals       Other \_\_\_\_\_  
 Financial Planning

6) What are your financial goals?

7) Which of the following best describes your financial goals? (Choose one)

I do not have any real financial goals  
 I have some financial goals but I do not know how to make them come true  
 I have some financial goals and I created a plan to make them come true  
 I have some financial goals and they are coming true

8) Which of the following best describes your monthly spending plan or budget? (Choose one)

I do not have enough money to have a budget  
 I would like to have a monthly budget, but do not know how to make one  
 I have a budget for the monthly bills but not for everyday expenses  
 I have a monthly budget and I use it to plan all of my monthly expenses

Thank you!