



It's time to Empower Your Financial Health.

Please answer the questions below prior to your appointment.

1 What is your main financial concern at the moment?

2 Do you feel afraid or anxious about your account statement?

- ☐ A. Yes
- ☐ B. No

3 Do you know how much your retirement is expected to be worth?

- ☐ A. Yes
- ☐ B. No

4 Do you own your home?

- ☐ A. Yes
- ☐ B. No, I'm renting
- ☐ C. No, I'm living with family or friends.

5 Are you contributing to a retirement plan?

- ☐ A. Yes
- ☐ B. No
- ☐ C. Not currently, but I have one

6 Can you save money every month?

- ☐ A. Yes
- ☐ B. No

7 If no to 5 and 6, does something hinder you from having a financial reserve?

- ☐ A. Yes
- ☐ B. No

8 If you or someone in your family passes away today, will everyone be able to live without your financial support or that of the deceased person?

- ☐ A. Yes
- ☐ B. No

9 What financial advice would you give to the person you love most?

Please answer the questions below prior to your appointment.

10 Who makes the financial decisions in your life?

- ☐ A. Me
- ☐ B. Me and a significant other
- ☐ C. Me and someone else
- ☐ D. Someone else makes the decisions

11 How would you describe your financial habits over the past year?

- ☐ A. I earn an income, put a portion in savings and spend what's left.
- ☐ B. I earn an income, spend money and save what's left.
- ☐ C. I earn an income, spend money and use credit cards for the rest.
- ☐ D. I earn an income, spend money

12 How would you describe your method to pay bills over the past year?

- ☐ A. I pay my bills and credit cards on time and in full.
- ☐ B. I pay my bills on time, but carry a credit card balance each month.
- ☐ C. I occasionally make a late payment on my bills, but not past 30 days.
- ☐ D. I struggle with bills and make payments more than 30 days late.
- ☐ C. Occasionally

13 Do you follow a monthly budget?

- ☐ A. Yes
- ☐ B. No

14 Do you have an emergency fund?

- ☐ A. Yes
- ☐ B. No

15 I would like to chat with a Financial Coach about *(mark all that apply)*:

- ☐ A. Talk about credit score and credit report
- ☐ B. Start a savings plan
- ☐ C. Start a budget
- ☐ D. Make sure I'm getting the best interest rates
- ☐ E. Other _____

MAKE SURE YOU BRING THE FOLLOWING ITEMS TO YOUR CHECKUP

1. Loan/credit card information *(balances, rate, monthly payments)*
2. Savings information
3. Income information *(including child support, alimony, disability benefits, etc.)*



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