Personal Client In-Take Form

Please provide the required information to request one (1) or all services available (12 month budget, debt and/or tax analysis, budget management, and purchase/sell car or home).

First Name:	
Last Name:	
Home Address:	
City, State, Zip Code:	
Contact Number:	
E-mail Address:	

Please check the services of interest below:

- ☐ **Budget Creation**
- ☐ **Debt Analysis**
- ☐ **Tax Analysis**
- ☐ **Budget Management**
- ☐ **Purchase/Sell Car**
- ☐ **Purchase/Sell Home**

Please see below the list of required documents needed to process your requested service/s:

Tax Analysis:
- Copy of your most recent paystub showing year-to-date amounts for taxes with-held
- Estimated income from contractor jobs (if applicable)
- Any other documents that would impact tax returns (i.e. retirement, real estate, investments)

Debt Analysis:
- Most recent credit report (preferably from Equifax)
- Any collection letters for prior debts
- Any dispute letters sent to credit bureaus (Equifax, Experian, and Transunion)

Budget Creation:
- All monthly expenses (i.e. Rent, Electric, Heat, Groceries, Car Note, etc...)
- All monthly income beside paycheck (i.e. Roommate Rent, Child Support Income, SSI, Retirement)

When speaking with your advisor, he or she will go over savings and debt goals you may like to accomplish over a three(3), six(6), nine(9) and twelve(12) month period. If for some reason you are having difficulties in obtaining any of the information above, please contact your advisor so they may assist in the gathering of the documents for free.