

FINANCIAL PLANNING WORKSHEET



Community
First

FEDERAL CREDIT UNION

Personal Information

First/Last Name :

Preferred Contact Method : Call Text Email Phone/Email :

Please bring your 2 most recent paystubs & 2 most recent bank statements (other than Community First FCU)

Goals

Select all that apply :

<input type="checkbox"/> Improve your financial literacy	<input type="checkbox"/> Create an estate plan	<input type="checkbox"/> Save for retirement & other long-term plans
<input type="checkbox"/> Create a budget	<input type="checkbox"/> Build good credit	<input type="checkbox"/> Save for short-term and mid-term plans
<input type="checkbox"/> Pay off debt	<input type="checkbox"/> Make more money	<input type="checkbox"/> Emergency savings

Monthly Household Income & Debts

Monthly Household Income

Source of Income :	<input type="text"/>	Amount :	<input type="text"/>
Source of Income :	<input type="text"/>	Amount :	<input type="text"/>
Source of Income :	<input type="text"/>	Amount :	<input type="text"/>
Source of Income :	<input type="text"/>	Amount :	<input type="text"/>

Loans & Credit Cards

Balance :	<input type="text"/>	Monthly Payment :	<input type="text"/>	Interest Rate :	<input type="text"/>
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Additional Information

History & cause of financial problems :

Steps already taken to improve financial well-being :

Additional comments :

How often would you like to meet? :

What times work best for you? :