



PERSONAL PROFILE SHEET

NAME	SPOUSE/OTHER	DATE	
ADDRESS	TELEPHONE	EMAIL	
EMPLOYER Participant _____ Spouse _____	OCCUPATION Participant _____ Spouse _____	High School or GED	Y/N
		Health Insurance	Y/N
		Dental Insurance	Y/N
		Life Insurance	Y/N
Support received - friends/relatives: _____ Support Provided - friends/relatives: _____	Balance on past due bills: \$ _____ Owed to: _____	Disability Insurance	Y/N
		Owns a Car	Y/N
		Has a will	Y/N
		Annual Credit Report	Y/N
		CREDIT SCORE: _____	

CHILDREN Gender and Ages

Note any special needs, interest and children's benefits received:

CHILDREN:	NOTES:
M/F Age:	
M/F Age:	
M/F Age:	
M/F Age:	

NOTES:



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PAYCHECK FREQUENCY: Participant _____ Spouse _____ Example: weekly, monthly, biweekly, semi-monthly	MONTHLY EARNINGS: Participant _____ Spouse _____	LIABILITIES: CREDIT CARD _____ AUTO LOAN _____ MORTGAGE _____ PERSONAL DEBT _____
EXPENSES: Housing _____ Utilities _____ Phone/Internet _____ Cable/Satellite _____ Transportation _____ Insurance _____ Debt _____ Medical/Prescription _____ Clothing _____ Entertainment _____ Education _____ Childcare _____ Miscellaneous _____	FINANCIAL PRODUCTS USED & Frequency/Cost Check Cashing _____ Money Orders _____ Title Loans _____ Payday Lenders _____ Rent to Own _____ Fees and Interest Paid \$ _____	OTHER INCOME SOURCES SNAP/Food Stamps _____ TANF _____ STUDENT LOANS _____ DISABILITY _____ CHILD SUPPORT _____ ALIMONY _____ OTHER _____
SAVINGS: _____		RETIREMENT _____ SPOUSE RETIREMENT _____



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OPEN ENDED QUESTIONS:

What major purchases do you plan to make in the next 6 to 12 months? How do you plan to pay for them?

How do you pay for unexpected expenses?

Is there something that you would like to save for?

Do you expect any life events (birth of a child, retirement, graduation etc...) to happen in the next 12 months?

NOTES
