



Name: _____ Date: _____

Phone: _____ Email: _____

How would you like to be contacted? Call Text Email

Employer: _____ Job Title: _____ Monthly Income: _____

Do you have any other household income? Yes: Monthly Income: _____ Source: _____ No

This is: Single Counseling Joint Counseling (please list their name, employer, and job title in additional comments below)

I am looking to (circle all that apply):

Prepare for a large purchase or lifestyle change

Prepare for retirement

Improve my credit

Create a budget

Get caught up on bills

Pay off debt

Accommodate change in income

Meet immediate family needs

Other (list in comments below)

Is White River Credit Union your primary financial institution? Yes No

If yes, please list account numbers:

Do you have anything that needs to be addressed immediately? Yes No

If yes, please list:

Have you had any overdraft fees or late payment fees in the last three months? Yes No

If yes, how many?

Are you currently past due on any bills, loan payments, or credit card payments? Yes No

If yes, please list:

Do you have any current or upcoming medical expenses? Yes No

What is your 1-year financial goal?

What is your 5-year financial goal?

How would you rate your financial wellness?

1 – Very Bad 2 – Bad 3 – Okay 4 – Good 5 – Very Good

Additional Comments:
