



Money Profile

Name:

Date:

1. What are your biggest challenges with money?
2. Do you have any debt? If so, what kind (ex. Credit cards, School Loans, Auto)?
3. Do you have an Emergency Fund of at least \$1,000 in place?
4. Do you have any retirement savings?
5. Is your income regular? In other words, is it the same from month-to-month?
6. Do you own your home, have a mortgage, or rent?
7. What are your passions and skills? What do you love doing where you could make money?
8. What are your goals for 1 year, 5 years, 10 years, and beyond?