THINK LIFE™ *is* DIFFERENT

CONSULTATION PREP

YOUR PRE-CALL MONEY SNAPSHOT

Let's get your numbers ready.

Fill in what you know. Estimates are fine. Write "not sure" if you need help.
Type in the boxes or print and write. Have this sheet ready for your call.

Name

Call date

01 Your monthly money

Use monthly household amounts.

AMOUNT / MONTH ($)

Household income before tax
Income each month before taxes are taken out.

Take-home income after tax
Money your household receives after taxes.

Living costs, not debt payments
Rent, food, utilities, transport and other living costs.

Debt payments each month
Credit cards, loans and mortgage payments. Count each once.

02 What you have and owe

Use balances today. Keep these amounts separate.

BALANCE ($)

Cash and savings
Money you can access now. Leave out loans and credit limits.

Other investments, not retirement
Stocks or funds. Leave out cash and retirement accounts.

Retirement accounts
For example, 401(k) or IRA. Keep separate from available cash.

Total debt owed
Remaining card, loan and mortgage balances, not monthly bills.

03 Your goals and questions

What would you most like to change about your finances?

What is your biggest question for the call?

Bring this sheet to your call. Do not include account numbers, card details or Social Security numbers.