

This questionnaire helps us understand your financial picture so we can build a personalized budget plan. All information is strictly confidential and used solely to provide personalized financial consulting services.

### SECTION A · Personal Information

1. Full Name

2. Date of Birth

3. Email Address

4. Phone Number

5. Preferred Contact Method

Phone

Email

Text

6. Marital Status

Single

Married

Domestic Partnership

Divorced

Widowed

7. Number of Dependents

8. Primary financial decision-maker in your household?

Yes

No

Shared Responsibility

### SECTION B · Income & Employment

9. Current Employment Status

Full-time Employed

Part-time Employed

Self-Employed / Freelance

Retired

Unemployed

Other

10. Approximate Gross Monthly Household Income

\$

11. Do you have secondary income sources (rental, side business, investments)?

Yes

No

If yes, please describe:

12. Is your income consistent month to month, or does it vary?

Consistent

Variable

If variable, please explain:

### SECTION C - Current Monthly Expenses

13. Estimate your average monthly expenses (enter dollar amounts):

Housing (rent / mortgage)

Utilities (electric, gas, water, internet)

Groceries & Household Supplies

Transportation (car payment, gas, insurance, transit)

Health Insurance & Medical Costs

Childcare or Education

Entertainment & Dining Out

Subscriptions & Memberships

Other Recurring Expenses

14. Do you currently track your spending?

Yes

No

If yes, how?

15. Irregular or seasonal expenses (holidays, vacations, annual fees)?

### SECTION D - Savings & Assets

16. Do you currently have an emergency fund?

Yes

No

If yes, approximate amount: \$

17. Do you contribute to retirement accounts (401(k), IRA, pension)?

Yes

No

If yes, monthly contribution: \$

18. Do you have other savings or investment accounts?

Yes

No

If yes, please describe:

19. Do you own significant assets (home, vehicle, business, real estate)?

Yes

No

If yes, please describe:

### SECTION E · Goals & Priorities

20. Top three financial goals in the next 12 months:

1.

2.

3.

21. Longer-term financial goals (3–5 years):

22. Upcoming major expenses (home purchase, wedding, education, travel)?

23. Satisfaction with your current financial situation (1 = Very Unsatisfied, 5 = Very Satisfied):

1

2

3

4

5

24. The single biggest challenge you face with budgeting today:

25. Anything else you'd like us to know before we begin?

### CLIENT AUTHORIZATION

Client Name (Print)

Signature

Date