

# Financial Mentoring Request & Profile

Hope Evangelical Free Church Last Modified November 2011

Thanks for your interest in Hope Church's Financial Mentoring Ministry. It is our hope that through this ministry you can gain understanding of your financial situation and move in the direction you sense God calling you as you steward the resources He's entrusted to you.

Our financial mentors offer their experience and understanding to provide guidance and coaching from a biblical perspective. It's important to understand that the mentors are volunteers and that the opinions and guidance given are meant as input for you to ultimately decide on your own financial matters. They do not hold themselves out as professional financial advisors and you should always seek professional advice as you believe your situation requires it. Any opinions provided by the mentors should not be construed as financial, tax, or legal advice – please seek professional advice in these areas.

**In order for us to most efficiently help you, please fill in as much of the information of this form as you currently know and return it to the Hope Church office.** Someone from our counseling ministry will connect you with a counselor within one week of receiving this information.

**For your first meeting, please bring the following items along with other items your mentors may request.**

- Save receipts for all expenditures between now & the first meeting with your mentor
- Any existing budget information you may have
- Copies of your last few bank statements showing expense transactions
- Your checkbook register, if applicable
- Anything else you think will help the discussion

**Depending on your goals and your current situation, these mentoring interactions can range from one meeting to potentially ongoing interactions for up to 3-6 months.** You and your mentor will determine meeting frequency and the duration of the interactions as you begin to meet.

**Name:** \_\_\_\_\_ **Age:** \_\_\_\_\_

**Spouse:** \_\_\_\_\_ **Age:** \_\_\_\_\_

**Address:** \_\_\_\_\_

**City:** \_\_\_\_\_ **State:** \_\_\_\_\_ **Zip:** \_\_\_\_\_

**Phone:** \_\_\_\_\_ **Email:** \_\_\_\_\_

**Names & ages of children:** \_\_\_\_\_

**Best possible days/times you can meet with a mentor:** \_\_\_\_\_

**GENERAL INFORMATION**

**How can the financial mentoring ministry help you?**

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**What steps are you taking to change or improve your present situation?**

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**Have you ever seen a financial planner/advisor? Yes / No. Who: \_\_\_\_\_  
How were you helped?**

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**AGREEMENT**

I (we) make the commitment to actively participate in seeking a resolution to the issues that brought me (us) to this place.

I (we) understand that the Hope Financial Mentor will attempt to assist me (us) in developing a plan, and that the mentor does not make any representations or warranties with respect to the results of the services or their ability to help me (us) with my (our) credit/financial management.

I (we) understand that mentoring is being offered to me (us) without charge or obligation and that the mentors are volunteers who are donating their time to people requesting their assistance. The mentors have pledged to not solicit or sell any services or products during the process of working with a ministry client.

I (we) further agree to indemnify and hold harmless all volunteers of the Financial Mentoring Ministry, Hope Church and its employees, agents, counselors, officers, and directors from any claim, suit, action, demand or liability of any kind and any nature arising out of, or in any manner connected with, my (our) participation in this ministry.

X \_\_\_\_\_ Date: \_\_\_\_\_

X \_\_\_\_\_ Date: \_\_\_\_\_

(if married, both spouses should sign)

**WHAT I OWN**

Checking Accounts \$ \_\_\_\_\_

Savings Accounts \$ \_\_\_\_\_

Other Savings \$ \_\_\_\_\_

Insurance (cash value) \$ \_\_\_\_\_

Retirement funds \$ \_\_\_\_\_

Home (market value) \$ \_\_\_\_\_

Auto (year \_\_\_\_ & make \_\_\_\_\_) \$ \_\_\_\_\_

Auto (year \_\_\_\_ & make \_\_\_\_\_) \$ \_\_\_\_\_

Other possessions (estimate) \$ \_\_\_\_\_

Money Owed to Me \$ \_\_\_\_\_

Other \$ \_\_\_\_\_

Other \$ \_\_\_\_\_

**WHAT I OWE**

	<b>Total Owed</b>	<b>Min Mo. Payment</b>	<b>Inteest</b>	<b>Other</b>	<b>Total Owed</b>	<b>Min. Mo. Payment</b>	<b>Interest</b>
Mortgage (current balance)	\$ _____	\$ _____	_____%	_____	_____	\$ _____	_____%
Home Equity Loan	\$ _____	\$ _____	_____%	_____	_____	\$ _____	_____%
Credit Cards:						\$ _____	_____%
_____	\$ _____	\$ _____	_____%	_____	_____	\$ _____	_____%
_____	\$ _____	\$ _____	_____%	_____	_____	\$ _____	_____%
_____	\$ _____	\$ _____	_____%	_____	_____	\$ _____	_____%
_____	\$ _____	\$ _____	_____%	_____	_____	\$ _____	_____%
Car Loan	\$ _____	\$ _____	_____%	_____	_____	\$ _____	_____%
Car Loan	\$ _____	\$ _____	_____%	_____	_____	\$ _____	_____%
Education Loan	\$ _____	\$ _____	_____%	_____	_____	\$ _____	_____%
Education Loan	\$ _____	\$ _____	_____%	_____	_____	\$ _____	_____%
Family/Friends	\$ _____	\$ _____	_____%	_____	_____	\$ _____	_____%

**WHAT I MAKE**

Use take home pay (the amount of the check)

Job #1 \$ \_\_\_\_\_  weekly  every other week  
 monthly  twice a month

Job #2 \$ \_\_\_\_\_  weekly  every other week  
 monthly  twice a month

Other income (explain) \_\_\_\_\_

Total monthly income = \$ \_\_\_\_\_

My spouse gets a check for:

Job #1 \$ \_\_\_\_\_  weekly  every other week  
 monthly  twice a month

Job #2 \$ \_\_\_\_\_  weekly  every other week  
 monthly  twice a month

## WHAT I SPEND

### EARNINGS/INCOME PER MONTH

Me (net take-home) \_\_\_\_\_  
 Spouse (net take-home) \_\_\_\_\_  
 Other (net of taxes) \_\_\_\_\_  
**TOTAL MONTHLY INCOME:** \_\_\_\_\_

### GIVING

Church \_\_\_\_\_  
 Other \_\_\_\_\_  
**TOTAL GIVING** \_\_\_\_\_

### SAVINGS

**TOTAL SAVINGS** \_\_\_\_\_

### DEBT

#### CREDIT CARDS

Visa \_\_\_\_\_  
 Master Card \_\_\_\_\_  
 Discover \_\_\_\_\_  
 Am. Express \_\_\_\_\_  
 Gas Cards \_\_\_\_\_

#### OTHER LOANS

Bank Loans \_\_\_\_\_  
 Credit Union \_\_\_\_\_  
 Family/Friends \_\_\_\_\_  
 Other \_\_\_\_\_

**TOTAL DEBT** \_\_\_\_\_

### HOUSING

Mortgage/Taxes/Rent \_\_\_\_\_  
 Maintenance/Repairs \_\_\_\_\_  
 Utilities \_\_\_\_\_  
   Electric \_\_\_\_\_  
   Gas \_\_\_\_\_  
   Water \_\_\_\_\_  
   Garbage \_\_\_\_\_  
   Phone \_\_\_\_\_  
   Cable/Internet \_\_\_\_\_

OTHER \_\_\_\_\_

**TOTAL HOUSING** \_\_\_\_\_

### AUTO/TRANSPORTATION

Car payments/License \_\_\_\_\_  
 Gas/Bus/Train/Parking \_\_\_\_\_  
 Oil/Lube/Maint \_\_\_\_\_

**TOTAL AUTO** \_\_\_\_\_

### INSURANCE (paid by you)

AUTO \_\_\_\_\_  
 HOMEOWNERS \_\_\_\_\_  
 LIFE \_\_\_\_\_  
 MEDICAL/DENTAL \_\_\_\_\_  
 OTHER \_\_\_\_\_  
**TOTAL INSURANCE** \_\_\_\_\_

### HOUSEHOLD/PERSONAL

GROCERIES \_\_\_\_\_  
 CLOTHES/DRYCLEAN. \_\_\_\_\_  
 GIFTS \_\_\_\_\_  
 HOUSEHOLD ITEMS \_\_\_\_\_  
 PERSONAL \_\_\_\_\_  
   Books/Magazines \_\_\_\_\_  
   Allowances \_\_\_\_\_  
   Music Lessons \_\_\_\_\_  
   Personal Technology \_\_\_\_\_  
   Education \_\_\_\_\_  
   Miscellaneous \_\_\_\_\_

**TOTAL HOUSEHOLD** \_\_\_\_\_

### ENTERTAINMENT

#### GOING OUT

Meals \_\_\_\_\_  
 Movies/Events \_\_\_\_\_  
 Babysitting \_\_\_\_\_

TRAVEL/VAC/TRIPS \_\_\_\_\_

#### OTHER

Fitness/Sports \_\_\_\_\_  
 Hobbies \_\_\_\_\_  
 Media Rental \_\_\_\_\_  
 Other \_\_\_\_\_

**TOTAL ENTERTAINMENT** \_\_\_\_\_

### PROFESSIONAL SERVICES

Child Care \_\_\_\_\_  
 Med/Dental/Prescription \_\_\_\_\_  
 Other \_\_\_\_\_  
   Legal \_\_\_\_\_  
   Counseling \_\_\_\_\_  
   Union/Prof Dues \_\_\_\_\_  
   Other \_\_\_\_\_

**TOTAL PROFESSIONAL** \_\_\_\_\_

### MISC. SMALL CASH EXPENSES

**TOTAL EXPENSES** \_\_\_\_\_

**TOTAL MONTHLY INCOME** \$ \_\_\_\_\_  
**LESS TOTAL EXPENSES** \$ \_\_\_\_\_  
**INCOME OVER (UNDER) EXPENSES** \$ \_\_\_\_\_