



Pillar Of Faith Ministries Financial Coaching: Preparation Checklist

Date _____

Name(s) _____

Address _____

Telephone _____

E-mail Address _____

Thanks for filling out this pre-appointment paperwork. Keep in mind that there are no wrong answers. We ask so we can serve you better. Your answers are VERY IMPORTANT for a successful meeting so do fill it in as best you can.

1) How did you hear about the Financial Coaching Ministry?

☐ Friends/Family ☐ Web/Online ☐ Message/Event ☐ Other (Please explain)

2) What is your relationship to the Rock Church?

☐ Member ☐ Attendee ☐ Visitor Other ☐ (Please explain)

3) Do you have a relationship with Jesus Christ? ☐ Yes ☐ No I don't know ☐

4) What is your current financial situation?

☐ Doing Ok ☐ Struggling ☐ Behind on Bills ☐ Other (Please explain)

5) What are your top 3 priorities you would like to discuss during your meeting:

☐ Live Within Means ☐ Budgeting ☐ Getting Debt Free ☐ How to be Generous
☐ How to Save ☐ Low Spending ☐ Future Planning ☐ Retirement
☐ Buying/Refinancing a Home ☐ Insurance/Investing Dream Funding

Other (Please explain) _____

6) Do you have a computer? ☐ YES ☐ NO
If yes, do you have Microsoft Excel? ☐ YES ☐ NO

7) What is your BIGGEST Financial Frustration? (Please explain)


