



The Village  
**Financial Resource Center**  
**Financial Assessment Questionnaire**

**1) What would you like to work on in our session today?**

**2) What are your expectations for the session?**

**3) What has recently happened that led you to seek help?**

**4) Are you behind on your? (Check those that apply)**

Rent or house payments       Car payments       Other loan payments  
 Any other payments?

**5) What areas would you like help with? (Check those that apply)**

Setting Values & Goals       Cash Management       Gambling  
 Divorce & Money       Tenant Education       Kids & Money  
 Payday Loans & NSF Checks       Pre-marital Financial Counseling       Buying a Home  
 Starting Over After Bankruptcy       Saving for Financial Goals       Other \_\_\_\_\_  
 Financial Planning

**6) What are your financial goals?**

**7) Which of the following best describes your financial goals? (Choose one)**

I do not have any real financial goals  
 I have some financial goals but I do not know how to make them come true  
 I have some financial goals and I created a plan to make them come true  
 I have some financial goals and they are coming true

**8) Which of the following best describes your monthly spending plan or budget? (Choose one)**

I do not have enough money to have a budget  
 I would like to have a monthly budget, but do not know how to make one  
 I have a budget for the monthly bills but not for everyday expenses  
 I have a monthly budget and I use it to plan all of my monthly expenses

Thank you!