



FINANCIAL COUNSELING PLANNING SHEET



1. Prepare for the Session

Case background research

2. Build the Relationship

Smile and warm greeting

Compliment

Privacy Act Statement

Normalize feelings

3. Gather Data

What is the presenting problem? _____

Expectations _____

Cost Question _____

What steps has client has taken? _____

Financial Planning Worksheet (pp. 1-4, actual)

4. Prioritize Concerns

Immediate/critical: _____

Pressing: _____

Long-term: _____

Referrals: _____

(Miracle Question) _____

(Exceptions) _____

5. Explore Options

FPW pg. 5—Action Plan

Increase income: _____

Decrease living expenses: _____

Decrease indebtedness: _____

6. Construct Solutions

FPW pg. 5—Action Plan

Projected column

New 'bottom line'

Compliment the client

7. Implement Plan

FPW Pg. 6—complete the Monthly Spending Plan

Tracking expenditures—Monthly Spending Record

Bring Closure to Session

Visualize Implementing Options

Can-do mind set

8. Monitor and Follow-up

Day and time