

Gathering Data - Please complete and bring the following prior to our first meeting:

**I. Goals** – List money-related goals for you/your family for each time frame and cost estimate:

<b>This year:</b>	<b>Within 5 years:</b>	<b>Long term 5+ years:</b>

**II. Account information** (I will not ask for any personal account numbers/access at any time)

- Current balances on checking/savings accounts
- Current balances on credit cards, loans, and any other non-retirement account
- List of monthly expenses... for example:
  - Mortgage or rent payments
  - Utilities (gas, electric, water, sewer, trash, etc)
  - Debts: Vehicle loans, student loans, personal loans, credit cards, etc.
  - Fixed payments: phones, internet, subscriptions, tuition, etc.
  - Insurance: car, home, life, health, dental, etc.
  - Living expenses (estimate): grocery, gas, pets, household, entertainment, etc.
  - Big expenses (estimate): medical, car/home repairs, holiday spending, etc.

**Use the sheet provided on the back and/or bring personal notes, bills, statements, etc.**

**Please note that I will never access your accounts or expect you to sync them with YNAB.**

