

## (10) THE FINANCIAL MENTOR'S MAP PREPARATION FORM

Participant: \_\_\_\_\_

### General Review

|                      | Status | Possible implications |
|----------------------|--------|-----------------------|
| Age                  |        |                       |
| Marital Status       |        |                       |
| Education            |        |                       |
| Dependents           |        |                       |
| Employment details   |        |                       |
| Support Services     |        |                       |
| Credit report review |        |                       |

### Quick Quiz Review

| Topic                                    | Question #  | Learning Opportunities |
|--|-------------|------------------------|
| Credit                                   | 1-10        |                        |
| Car obligations<br>Loan<br>Car Insurance | 11<br>27-28 |                        |
| Credit reports                           | 12-18       |                        |
| Spending plan                            | 19-22       |                        |
| Financial services                       | 23-26       |                        |
| Financial planning                       | 29-30       |                        |

### Quick Questionnaire Review

| Questions                    | Status | Possible implications |
|------------------------------|--------|-----------------------|
| Q1 - 2 Lifestyle Changes     |        |                       |
| Q3 - 7 Employment Situation  |        |                       |
| Q8 Debt                      |        |                       |
| Q9 - 11 Financial Protection |        |                       |
| Q12 & 13 Resource Access     |        |                       |

### Financial Goals

| # | Goal | Considerations | Possible action steps; Resource / Learning Materials |
|---|------|----------------|--|
| 1 |      |                |  |
| 2 |      |                |  |
| 3 |      |                |  |
| 4 |      |                |  |
| 5 |      |                |  |