FINANCIAL SNAPSHOT

CLASS START DATE (MM/DD/YY) ☐☐ / ☐☐ / ☐☐

CLASS LOCATION CODE ☐☐☐☐☐☐

FIRST NAME

SPOUSE FIRST NAME

LAST NAME

Complete this form online at daveramsey.com/fpumember

COORDINATOR FIRST NAME

COORDINATOR LAST NAME

Complete information in column 1, session #3, based upon your current financial situation since you started applying the "Financial Peace" principles; even if you started applying them prior to taking the FPU class.

Areas to work on IMMEDIATELY	Session 3	Session 6	Session 9	Session 12
Have a budget that works?	○ Yes ○ No	○ Yes ○ No	○ Yes ○ No	○ Yes ○ No
Paying necessities before creditors?	○ Yes ○ No	○ Yes ○ No	○ Yes ○ No	○ Yes ○ No
Cut up all credit cards?	○ Yes ○ No	○ Yes ○ No	○ Yes ○ No	○ Yes ○ No
Living on envelope system?	○ Yes ○ No	○ Yes ○ No	○ Yes ○ No	○ Yes ○ No
How many envelopes?	☐☐	☐☐	☐☐	☐☐
$1000 in emergency fund?	○ Yes ○ No	○ Yes ○ No	○ Yes ○ No	○ Yes ○ No
Amount now in fund?	$	$	$	$
Giving to worthy causes?	○ Yes ○ No	○ Yes ○ No	○ Yes ○ No	○ Yes ○ No
Using the buddy system?	○ Yes ○ No	○ Yes ○ No	○ Yes ○ No	○ Yes ○ No
Debts paid?	○ Yes ○ No	○ Yes ○ No	○ Yes ○ No	○ Yes ○ No
How much $$ so far?	$	$	$	$
3-6 months expenses saved?	○ Yes ○ No	○ Yes ○ No	○ Yes ○ No	○ Yes ○ No
How many months saved?	☐☐	☐☐	☐☐	☐☐
Saving now for major purchases?	○ Yes ○ No	○ Yes ○ No	○ Yes ○ No	○ Yes ○ No
List types.				
Funding pre-tax savings?	○ Yes ○ No	○ Yes ○ No	○ Yes ○ No	○ Yes ○ No
College funding started?	○ Yes ○ No	○ Yes ○ No	○ Yes ○ No	○ Yes ○ No
Paying extra on mortgages?	○ Yes ○ No	○ Yes ○ No	○ Yes ○ No	○ Yes ○ No
Walking in Financial Peace?	○ Yes ○ No	○ Yes ○ No	○ Yes ○ No	○ Yes ○ No