

Robert Keisler Coaching LLC

“Helping navigate the sea of change”

Priority Analysis

Identify with a “1”, “2” and “3” your top 3 priorities for the next six (6) months:

1. Developing a Spending Plan (Budget) _____
2. Personal Debt Elimination _____
3. Establishing an Emergency Fund / Opportunity Savings Fund _____
4. Estate Planning – Wills & Trusts _____
5. Career Planning _____
6. Retirement Planning / Financial Independence Planning _____
7. Investment Planning _____
8. Purchase a Home _____
9. Life Insurance _____
10. Other Goals _____

What specific issues would you like to discuss during your complimentary 30 min consultation?

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Married Single Divorced Widowed

Name _____

Spouse Name _____

Address _____

City _____ State _____ Zip Code _____

Home Phone _____

Cell Phone (H) _____

Cell Phone (W) _____

Email address _____

Husband's occupation _____

Wife's occupation _____

Number of Children _____

Name(s) age(s) _____

Special Needs or Concerns: _____

Approx. Household Income: less than \$20K \$20 – 40K \$40 – 60K

\$60 – 80K \$80 – 100K \$100 – 200 K over \$200K

Non-Mortgage Debt: less than \$10K \$10 – 20K \$20 – 30K \$30 – 40K

\$40 – 50K \$50 – 60K \$60 – 75K \$75 – 100K over \$100K

Are you behind on any debt? Yes No

Have you taken an Financial Peace University (FPU) class? Yes No