



Money Management Questionnaire

Welcome to {Bank Name}. Please complete the following information and the checklist below:

Name: _____

Checking Account #: _____

Savings Account #: _____

Today's Date: _____

Reason for Visit: _____

Financial Planning Checklist

Which of the following items would you like to learn more about?

- Eight Simple Steps for Balancing Your Checkbook
- Creating an Effective Personal Budget
- Debt Reduction Strategies
- Seven Steps to Better Money Management
- Effective Strategies for Saving
- Understanding Credit Card Debt (Refer to Money Management References)
- Managing Expenses (Refer to Money Management References)