

Private Coaching and Software Setup Form

Name: _____ Today's Date: _____

Address: _____

Phone: _____ Alternate Phone: _____

Appointments Date: _____ Referring Agent: _____

The more accurate the information you provide is, the more accurate your payoff projection will be. However, it is very simple to add new income or expenses, to delete items, and to make adjustments.

Mortgage					
Primary residence:	Orig. Loan Amount	Current Balance	Interest Rate	Term	Total Monthly Payment

	Description	Amount	When received/intervals
Income from ALL sources, including rentals, child support, alimony, disability, retirement, 401K and, money market accounts			

	Description	Due Dates Required & Intervals
Itemized expenses (no debts) All monthly, quarterly, semi-annual and annual expenses. E.g., utilities, home-, auto-, life- and medical insurance; food; entertainment; utilities; gasoline; grooming; vacations; birthdays and any other expenses but remember, no debts!		

Please continue on the back or on plain paper

	Name	Limit	Balance	Interest Rate	Minimum Payment	Due Dates
Debts Credit cards, auto loans, student loans, HELOCs, investment properties						

* Due dates are required for Software Setup, but less important for an initial strategy session.

IMPORTANT—Please

Mark your appointment in your calendar. If you need to cancel or reschedule, contact Shane Jackman directly at 209-345-8165 or email to shanejackson7@yahoo.com

Be in front of your computer and connected to the Internet. You'll be watching your Financial Coach Mr. Jackman's screen.

Have your financial information together, as indicated on this sheet. If you have income or expenses we haven't mentioned, please add it.

Do everything you can to have your spouse or cohabiting partner with you for our 1-on-1 personal strategy session/webinar.

Mr. Jackman will call you at the appointed time, or within 20 minutes after, if he's still finishing up with a prior client. When he's on the phone with you, you will be his #1 and only focus, and he will not rush you to get to his next appointment.