

FFT™ Financial Counseling Service Entry
 (Required elements are underlined.)

Client Name: _____

Date: _____

Start time: _____

Duration (in minutes): _____

Staff Person: _____

Contact Location/Method: In person By phone By email By fax By mail By text message By social media Other

Did you reach the person you attempted to contact? Yes No

Contact with: Client Employer Service Provider Other

| Story | Name of Entity | Status | De tails |
|-------------------------------------|-----------------------|---------------|--|
| Apartment Rental | | | |
| Auto Insurance | | | |
| Auto-Title Loan | | | |
| Bankruptcy (Chapter 7) | | | |
| Bankruptcy (Chapter 11) | | | |
| Bankruptcy (Chapter 13) | | | |
| Car Purchase (cash) | | | |
| Car Purchase (loan) | | | |
| Certificate of Deposit | | | |
| Checking Account | | | |
| ChexSystems Error | | | |
| Child Support (for Petitioner) | | | |
| Credit Builder Loan (with match) | | | <input type="checkbox"/> Twin Accounts? |
| Credit Builder Loan (without match) | | | <input type="checkbox"/> Twin Accounts? |
| Credit Card (includes store cards) | | | Type of Credit Card: <input type="checkbox"/> Secured <input type="checkbox"/> Unsecured Paying: <input type="checkbox"/> Minimum <input type="checkbox"/> More than minimum <input type="checkbox"/> Entire balance |

FFTTM Financial Counseling Service Entry

(Required elements are underlined.)

| | | | |
|---|--|--|--|
| Credit Report Error | | | |
| Debt Consolidation Loan | | | |
| Debt Consolidation Program | | | |
| Delinquent Bill | | | Type of Delinquent Bill <input type="checkbox"/> Medical <input type="checkbox"/> Non-Medical |
| Educational Savings Account | | | |
| Home Equity Loan (Line of Credit-HELOC) | | | |
| Home Loan (purchase/refinancing) | | | |
| Homeowner/Renter Insurance | | | |
| Identification Acquisition | | | |
| Identification Error | | | |
| Identity Theft | | | |
| Individual Development Account | | | |
| Informal Loan | | | |
| Investment Portfolio (non real estate) | | | |
| Judgment (i.e. child support arrears) | | | |
| Lending Circle | | | |
| Life Insurance | | | |
| Line of Credit (not HELOC) | | | |
| Other Formal Loan | | | |
| Payday Loan | | | |
| Property Tax Appeal | | | |
| Property Tax Exemption | | | |
| Real estate investment (loan) | | | |
| Refund Anticipation Loan | | | |
| Rent-to-own Plan | | | |
| Retirement Account | | | |
| Reverse Mortgage | | | |
| Savings Account | | | |
| Stored Value Card (prepaid card) | | | |
| Student Loan | | | |
| Tax Arrears | | | |
| Transaction Dispute | | | |

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Notes: _____

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