

# 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 video conference     By social media     Other

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

**Contact with:**     Client     Employer     Service Provider     Other

<b><u>Story</u></b>	<b><u>Name of Entity</u></b>	<b><u>Status</u></b>	<b><u>De tails</u></b>
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)			<b>Type of Credit Card:</b> <input type="checkbox"/> Secured <input type="checkbox"/> Unsecured <b>Paying:</b> <input type="checkbox"/> Minimum <input type="checkbox"/> More than minimum <input type="checkbox"/> Entire balance

## FFT™ Financial Counseling Service Entry

(Required elements are underlined.)

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

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

**Notes:** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

---

FFT™ is a registered mark of, and FFT™ templates are proprietary to, Local Initiatives Support Corporation. FFT™ includes certain methodology that is confidential and proprietary to Project Match-Families in Transition Association, including specifically the method by which one-time outcomes and over-time outcomes are distinguished, tracked, and entered (including, without limitation, the usage of the status codes such as “beginning”, “interim”, and “end” or terms that embody similar concepts). You may not disseminate information pertaining to FFT™ or any component thereof (including without limitation third party methodologies) to unauthorized individuals nor embody any component of the FFT™ templates in any products or exploit the same in any way.”

© Local Initiatives Support Corporation 2012. This work is protected by United States copyright law. Apart from any use as permitted by the U.S. Copyright Act, no part of this document may be reproduced, distributed, transmitted, or published without the express written permission of Local Initiatives Support Corporation. You may not alter or remove any copyright notice or proprietary legend contained in or on this document.

Local Initiatives Support Corporation does not guarantee the accuracy, completeness, or usefulness of any content in this document or its fitness for any particular purpose.