

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

Digital Skills Training/Navigation: Yes No

Story	Name of Entity	Status	Details
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:

FFT™ Financial Counseling Service Entry

(Required elements are underlined>)

			<input type="checkbox"/> Minimum <input type="checkbox"/> More than minimum <input type="checkbox"/> Entire balance
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			
Financial Technology			
Home Equity Loan (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)			
Microenterprise Loan			
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			

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

Stored Value Card (prepaid card)			
Student Loan			
Tax Arrears			
Transaction Dispute			

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.