

Please print this entire document and complete the blank fields.

Congratulations!

You have taken an important step in addressing your financial concerns. Before you begin completing your Money Manager Planner, please note the following information.

Discussing one's personal finance is often difficult, stressful, and sometimes embarrassing. The counselor you will meet with is a professional who is dedicated to assisting you. All counseling sessions are private and are kept strictly confidential. Telephone Counseling is also available.

The key to a successful consultation is filling out the enclosed forms accurately and completely. Your counselor will rely heavily on that information in making suggestions and recommendations. Incomplete or erroneous information may result in our being unable to properly advise you.

Please call for an appointment, and we would encourage you to bring your completed application with you to the appointment. **Married couples are encouraged to attend together.** Most appointments last an hour and a half. Please do not bring children with you. We look forward to working with you.

CHECKLIST

- Three Recent Paycheck Stubs
- All Creditor Statements
- Completed Money Manager Planner
- Any Garnishment/Legal Documents

Appointment Date: _____

Appointment Time: _____

Location: _____

Counselor: _____

"Directions for Mastering Money Management"
Birmingham-Anniston-Hoover

Main Office
(205) 251-1572

Toll Free
 1-888-260-CCCS
 (2227)

Name/Address/Phone		
Last Name, First, Middle, Maiden	Date of Birth	Social Security Number
Spouse	Date of Birth	Social Security Number
Current Address	How Long?	Home Telephone
City State Zip	County	Rent Mortgage Other
Previous Address		
City State Zip		
Martial Status (circle one): Single Married Divorced Widowed Number of Children in Household <div style="text-align: right;">Ages</div>		
Employer		
Employer	Occupation	
Address	Telephone	
City State Zip	Length of Employment	
Employer	Occupation	
Address	Telephone	
City State Zip	Length of Employment	
Income		
	Self(circle one) Weekly Biweekly Bimonthly Monthly	Spouse(circle one) Weekly Biweekly Bimonthly Monthly
Gross Income(1)		
Take Home Pay		
Payroll Deducted Loans/Allotment		
Gross Income(2) Part Time Job		
Take Home Pay		
OTHER SOURCES INCOME (TAKE HOME)	Self	Spouse
Alimony / Child Support		

Goals:

For Office Use Only

_____ # of Creditors	Creditor Disbursement \$ _____
\$ _____ Total Debt	Escrow \$ _____
_____ # of DMP Creditors	CCCS Fee 5% \$ _____
\$ _____ Total DMP Debt	DMP Payment \$ _____

Housing	Monthly Estimate	Adjusted/Notes
Mortgage Rent		
Second Mortgage / Land or Lot Payment		
Electricity		
Heating		
Water/Sewer		
Telephone Car or Cell Phone / Pager		
Property Tax (if not escrowed)		
Home Maintenance / Security System		
Garbage Service		
Pest Control / Termite Bond		
Food		

Groceries		
Food at Work (daily average X 20 days)		
School Lunches (daily average X 20 days)		
Eating Out (weekends or nights)		
Car		
Gasoline		
Car Repairs, Maintenance		
Car Payment / Bus / Parking / Car Pool		
Car Tags		
Personal		
Personal Items / Toiletries		
Barber / Beauty Shop		
Allowances for Children		
Child Care		
Child Support / Alimony		
Tobacco / Alcohol		
Insurance		
Automobile		
Homeowners (if not escrowed)		
Life (if not payroll deducted)		
Medical		
Doctor Visits (yearly average / 12 months)		
Medication		
Dentist (yearly average / 12 months)		
Clothing		
Clothing (yearly average / 12 months)		
Dry Cleaning / Laundry		
Gifts & Donations		
Birthday (yearly average / 12 months)		
Christmas		
Other Gifts (Anniversaries, Mother's Day, etc...)		
Church Donations / Charities		
Tuition / School Fees		
School Books / Supplies		
Professional Dues		
Entertainment		
Movies / Video Rentals / Plays		
Cable TV / Online Computer Service		

Books / Magazines / CDs		
Other		
Postage / PO Box Rental / Safety Deposit Box		
Pet Supplies / Vet Bills (yearly average / 12 months)		
Fee on checking account		
SAVINGS / EMERGENCY FUNDS		
Other		
Total:		

Net Monthly Income \$_____

CCCS Payment \$_____

Monthly Expenses May Not Exceed \$_____

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