Financial Counseling Information Summary

Initial appointment:

Today's date _____ Call taken by _____Date _____ Time _____

Name _____
Spouse _____
Address _____
_____
Telephone: Home _____
Work _____ (self)
_____ (spouse)
Best time to be reached _____

Heard about service from ....
...a friend _____ ❒
...Fellowship ❒
...referred by _____ ❒
...an event ❒
...another source ❒
Explain: _____
_____

PRIMARY STEPS TO DO	DATE ACCOMPLISHED
Pre-appointment letter mailed (or e-mailed)	
Personal Financial Statement mailed (or e-mailed)	
Confirmation Phone Call made	
File Created	
A Commitment to Counseling form signed	
Book/Armband given	
Post-appointment letter mailed (or e-mailed)	
Follow – up appointment scheduled (call or e-mail to see how they are doing. Is there anything we can pray for? Would they like to come in for a second counseling session?)	

APPOINTMENT / CONTACT LOG

(This is for all appointments and contacts made after the above steps have been taken)

DATE	EXPLANATION	DATE	EXPLANATION