

Debt Planner

Prepared By:

Date:

1 Client Information

Client _____ Spouse/Partner _____
DOB _____ DOB _____

2 Debt 1

Type _____
Interest Rate _____ % Loan Balance \$ _____
Current Payment \$ _____ Minimum Payment \$ _____

3 Debt 2

Type _____
Interest Rate _____ % Loan Balance \$ _____
Current Payment \$ _____ Minimum Payment \$ _____

4 Debt 3

Type _____
Interest Rate _____ % Loan Balance \$ _____
Current Payment \$ _____ Minimum Payment \$ _____

5 Debt 4

Type _____
Interest Rate _____ % Loan Balance \$ _____
Current Payment \$ _____ Minimum Payment \$ _____

*Add a second questionnaire if additional debts exist.