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Initial Coaching Needs Analysis Questionnaire

Personal; Business & Finance Coaching Form

Objective: To help you to develop a life plan which includes, your image, relationship, leadership, business, and a sound financial strategy that will meet the following needs:

i. To help you to reduce risks
ii. Reduce cost
iii. Reduce Expenses
iv. Protect your Assets and your Estate
v. Increase your bottom line / Cash Flow
vi. Income replacement/protection in the event of untimely death
vii. Income replacement in the event of disability
viii. Funds for College Education for children
ix. Retirement Plans
x. Long Term Care
xi. Best Tax-advantage strategy for investment growth
xii. Strategy for building sustainable wealth
xiii. Strategy for Protecting your Assets, to reduce liability and preserve what you have earned.

Cost: "Cost is only a matter in the absence of value". If I can save you from making poor finance and business decisions that save you $100,000 or more, how much would you pay me and how much do I deserve?

If I can help you to make $100,000 or more how much would you pay me or how much do I deserve?

Compensation for my services is $250/hr. billed in 1hr increment, or a retainer of $150/mth with a $1000 deposit. I can guarantee saving or to make you a minimum of 3 x times your consultation fees.

Your Consultation Fees will be waived as my gift of thanks to you for your support of the Bobby's World and BPU Make Over Atlanta event

Evaluating your personal life

"Would you go to your doctor and ask him/her to give you his best medical advice on the health of your total body system, and accepts his prescription if he does not do a complete medical analysis of your body (blood work, diagnosis machines, X-rays, etc?) Then do not be intimidated by the process of gathering information by your Financial Strategist, who needs to be thorough to give you his/her best professional advice regarding your family's finances."

Think about all of the stages in your life-marriage or divorce, the birth of a child, the purchase of a new home, children graduating from college, etc. Careful planning goes into each of these life events. Unfortunately, while most of us are convinced we've 'thought of everything when it comes to these life-changing events, re-evaluating our financial needs is something we typically forget.

This evaluation is intended to allow me to provide you with my best professional advice and help you to create a financial strategy to reduce expenses, reduce the cost you are currently paying for goods and services, and help you to find money ***(THAT YOU ARE CURRENTLY SPENDING)*** to create emergency savings, and build wealth for future life events.

Overview Outlook Questions

What area(s) of concern do you need Professional Counselling in?

Personal Life? Yes ☐ No ☐

Personal Finances Yes ☐ No ☐

Personal Credit Yes ☐ No ☐

Investing Yes ☐ No ☐

Business Finances Yes ☐ No ☐

Business Development Yes ☐ No ☐

Business Projects Yes ☐ No ☐

Legal Issues Yes ☐ No ☐

Estate Planning – Wills, Estate & Trust (*property & asset protection*) Yes ☐ No ☐

Areas of Potential Interest

How often do you take a family vacation? ________________________ Would you be interested in learning how to pay for vacations without going into your pocket? Yes _____ No ______

How often do you change your Car? _____________________________ would you be interested in learning how to drive a new car every two years, without paying for it out of your pocket?

Would you be interested in learning how to have your mortgage paid without going into your pocket? Yes ____ No _____

Would you be interested in learning how to reduce your Tax liability Yes _______ No ______

Initial Consultation Questionnaire

A. Primary Income Earner:

Name ____,

Date of Birth ____ /_____/_____

Source(s) of current income Job ☐____ Self Employed ☐__ Business ☐____ Investments ☐____

B. Have you ever played any kind of competitive sports? _____, if Yes, what have you learned about the power and purpose of a Coach? ____

____

____

C. What do you want, what is your vision of where you want to be within the next 5, 10, or 20 years, Explain

____

____

____

D. Do you have a final will and testimony? Yes ☐___ No ☐_____
E. Do you have a living will? Yes ☐___ No ☐____
F. Do you have a Family Trust? ☐____
G. Do you have any financial instruments to replace your income should you become disabled? Yes ☐___ No ______

H. What tools or support services are you currently using?

H1. Do you have Goals Yes ☐___ No ☐___, If Yes, are they written? Yes _____ No ______.

If yes, where do you keep your goals? ____

H2. Do you have a Personal Life Coach? _______

H3. Do you have a Professional Financial Advisor? _______

H4. Do you have a Professional Relations Advisor? ________

H5. Do you have a Professional Business Coach? _______

Please download and send your completed form as an attachment to nasbisvc@gmail.com and we will contact you to schedule your Free Consultation. Please note that this form and this offer will only be available for a short time before it is removed from the website. Therefore if you are interested in getting your finances together hurry up and take advantage of this one-time offer.