



Today's Date: \_\_\_\_\_

Member Name: \_\_\_\_\_ Member #: \_\_\_\_\_

*Complete all that is applicable*

**External Financial Institution and or Lending Information**

#1 External Name: \_\_\_\_\_

Statements provided? \_\_\_\_\_ Yes \_\_\_\_\_ Not at this time

Products and Services at External- including rates/payment information:

#2 External Name: \_\_\_\_\_

Statements provided? \_\_\_\_\_ Yes \_\_\_\_\_ Not at this time

Products and Services at External- including rates/payment information:

#3 External Name: \_\_\_\_\_

Statements provided? \_\_\_\_\_ Yes \_\_\_\_\_ Not at this time

Products and Services at External- including rates/payment information:



**Credit**

Credit Score (if inquired): \_\_\_\_\_

Consent to Pull Credit Form: \_\_\_\_\_

Credit Report Findings:

Suggestions for Credit Building or Repair:

Other Notes:

**Budgeting**

Complete the Budget Calculator- print and add to this document

Budget Findings:

Suggestions for Budget Improvement and financial growth:

Other Notes:



## MEMBERSHIP ACADEMY-MEETING SUMMARY

Follow up Academy Meeting scheduled? \_\_\_\_\_

Date: \_\_\_\_\_

Goals to be met or worked towards by next Academy Meeting:

Any other thoughts that didn't fit into an above category?