

FINANCIAL & CREDIT CLIENT INTAKE FORM

Download, complete, and save this PDF for your service review.

HOW TO USE THIS FORM

1. Complete the fields that apply to your service. 2. Save the completed PDF.

Keep the completed PDF saved with your service records.

Full name

Email

Phone number

Payment / order reference (optional)

Purchased service - check one

- ☐ Financial Review / Financial Audit - \$65
- ☐ Credit Recommendations, Analysis & Education - \$60
- ☐ Financial Review + Credit Recommendations, Analysis & Education - \$125

Primary goal - check all that apply

- ☐ Build savings
- ☐ Reduce / organize debt
- ☐ Understand spending / cash flow
- ☐ Prepare for a major purchase
- ☐ Understand credit report / credit factors
- ☐ Create an organized financial action plan

Other goal

Preferred contact method ☐ Email

☐ Phone call

☐ Text message

DO NOT INCLUDE SENSITIVE ACCESS INFORMATION

Do not provide passwords, PINs, authentication codes, bank-login credentials, full payment-card numbers, or unnecessary Social Security information. CNF will never ask for your account passwords in this form.

FINANCIAL SNAPSHOT

Complete estimates where possible. Exact figures are helpful but not required unless requested.

Approx. monthly take-home income

Approx. monthly fixed expenses

Approx. monthly variable spending

Approx. monthly debt payments

Total approximate debt

Approx. current savings

Main monthly expenses or bills you want included in the review

Debts you want organized or reviewed (type of debt + approximate balance/payment; no account numbers)

What would you like reviewed, explained, or improved?

Any upcoming financial deadline, purchase, or goal date?

CREDIT REVIEW DETAILS & ACKNOWLEDGMENT

Complete this page if your service includes credit recommendations, analysis, or education.

Approximate credit-score range (optional)

Credit-report source/date (optional)

Credit topics you want explained - check all that apply

- ☐ Credit utilization
- ☐ Payment history
- ☐ Age of accounts
- ☐ Hard inquiries
- ☐ Collections / derogatory items
- ☐ Debt organization
- ☐ How to read a credit report

Specific credit questions or report items you want reviewed

CLIENT ACKNOWLEDGMENT

1. I understand that Career & Finance Ascensions (CNF) provides educational, analytical, organizational, and recommendation-based services.
2. I understand that CNF does not guarantee a credit-score increase, deletion, loan approval, debt reduction, savings result, or other specific outcome.
3. I confirm that the information I provide is truthful to the best of my knowledge and that I will not send passwords, PINs, or account-login credentials.

☐ I have read and understand the acknowledgments above.

Client name / typed signature

Date