Confederated Tribes of the Chehalis Reservation

Financial Education & Budgeting Assistance Request Form

Client Name: _____

Date: _____

Case Worker: _____

Phone Number: _____

Email (Optional): _____

Reason for Request

Please check all areas you would like assistance with:

☐ Creating a monthly budget

☐ Balancing a checking account

☐ Understanding bank statements

☐ Opening a checking or savings account

☐ Building healthy spending habits

☐ Paying off debt

☐ Credit education

☐ Understanding credit scores

☐ Repairing credit

☐ Saving money

☐ Emergency savings planning

☐ Financial goal setting

☐ Managing monthly bills

☐ Understanding loans

☐ Avoiding predatory lending

☐ Identity theft prevention

☐ Homeownership financial preparation

☐ Renting and housing budget planning

☐ Utility budgeting

☐ Grocery budgeting

☐ Transportation budgeting

☐ Child-related budgeting

☐ Understanding insurance costs

☐ Tax preparation resources

☐ Other:

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Preferred Class Format

☐ One-on-One Appointment ☐ Virtual One-on-One Meeting

☐ No Preference

Preferred Days

☐ Monday ☐ Tuesday ☐ Wednesday ☐ Thursday ☐ Friday

Preferred Time

☐ Morning (8:00 AM–12:00 PM) ☐ Afternoon (12:00 PM–4:00 PM)

Current Financial Goals

(Check all that apply.)

☐ Create a workable monthly budget ☐ Reduce debt

☐ Increase savings ☐ Improve credit score

☐ Purchase a vehicle ☐ Purchase a home

☐ Become financially independent ☐ Prepare for employment

☐ Manage monthly expenses ☐ Other:

Additional Services You May Be Interested In

☐ Employment Resources ☐ Housing Resources

☐ Utility Assistance ☐ Food Assistance

☐ Benefits Navigation ☐ Financial Coaching

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☐ Credit Counseling Referral ☐ Tax Assistance

☐ Youth Financial Education ☐ Elder Financial Education

☐ Victim Financial Assistance ☐ Other:

Notes / Specific Questions

Appointment Information (Office Use Only)

Class Scheduled:

Date: _____ Time: _____

Location: _____ Instructor: _____

☐ Reminder Sent ☐ Completed

☐ Rescheduled ☐ No Show

Client Acknowledgment

I understand this class is intended to provide financial education and budgeting assistance. Participation is voluntary, and the information provided is educational in nature.

Client Signature: _____ Date: _____

Staff Signature: _____ Date: _____