



**Please submit the following information  
for your NEXT Coaching Session.  
Let's optimize our time together!!**

### HOUSEHOLD INFORMATION

**Your Household is anyone you live and share financial resources with.**

Number of Adults (age 17+)

Number of Children (under 17)

Age of Each Child

### CAREER CHOICE

Broad Occupation Group

Occupation

Training Duration

\$ Tuition

\$ Grants

YES / NO Employment while in School

Hours/Week

\$ \$\$/Hour



### INCOME & ASSETS

\$ Monthly Household Income (not including yours)

\$ Monthly Child Support Income

\$ Monthly Investment Income (stocks, etc)

\$ Checking & Savings Account Balance

## MONTHLY EXPENSES

- Rent or Mortgage*
- Utilities (gas, electric, water, trash, internet)*
- Child Care*
- Food*
- Transportation*
- Other*

## TAX CREDITS

***Do you anticipate applying for these credits when you file your taxes?***

- EITC (Earned Income Tax Credit)*
- CTC (Child Tax Credit)*
- CDCTC (Child & Dependent Care Tax Credit)*

## PUBLIC ASSISTANCE PROGRAMS

***Are you currently receiving any of these?***

- Medicaid*
- Children's Health Insurance (CHIP)*
- Health Insurance Marketplace Subsidies*
- Supplemental Nutritional Assistance (SNAP)*
- Free or Reduced Price School Meals*
- Subsidized Child Care*
- Head Start or Early Head Start*
- Section 8 Housing Voucher*

**NEXT STEP:**  
***Book Appointment  
with Your Coach***