



Client ID # _____

First Name: _____

Middle Name: _____

Last Name: _____

Address: _____

City: _____

County: _____

State: _____

Zip: _____

Email Address: _____

Phone Number: (____) ____ - _____

Birth Date: ____ / ____ / ____

Last 4 of SSN : _____

Primary Race: (Check one)

- African American/Black
- American Indian/Alaskan Native
- Asian/Asian American
- Hispanic
- Native Hawaiian/other Pacific Islander
- White
- other

Ethnicity: (Check one)

- Hispanic/Latino
- Non-Hispanic/Latino
- Other

Gender:

- Female
- Male
- Other

Language Preference: _____

Do you have a Disability:

- Yes
- No
- Not Disclosed

Military Status:

- Active Duty
- Veteran
- None
- Unknown
- Not Disclosed

Marital status:

- Single
- Married
- Separated
- Divorced
- Widowed
- Other

Current living situation:

- Rent
- Own
- Live with Family
- Other

Are you interested in housing counseling?

- Yes
- No

Monthly Housing Cost: \$ _____
(Rent or mortgage)



Type of Household: (Check one)

- Couple with Children
- Couple without Children
- Grandparent/Other Guardian with Children
- Multi-generational
- Single Female
- Single Female with Children
- Single Male
- Single Male with Children
- Unaccompanied Youth
- Other

Number of Adults in Household: _____

Number of Children Under the Age 18 in Household: _____

Do you have a family member with a disability?

- Yes
- No
- Not disclosed

Employment Status: (Check one)

- Full time
- Part time
- Self-employed
- Seasonal
- Student
- Retired
- Disabled
- Unemployed
- Other

Total Gross Monthly Income: (Please fill in all applicable boxes and calculate the total)

Gross Wages	\$
Child Support	\$
SNAP, TANF/GA	\$
Unemployment	\$
Pension	\$
Social Security/SSI, Disability	\$
Other (<i>Income of family members' wages, Gifts Stipends, Rental property, ect.</i>)	\$
Other	\$
Total income	\$

Have you been rejected for a bank account in the last 5 years? :

- Yes
- No



**Highest level of education completed:
(Check one)**

- Completed K-5
- Completed 6-8
- Completed 9-11
- High school diploma or GED
- Vocational School Diploma or degree
- Some college
- AA Degree
- BA or BS Degree
- Some Graduate School
- MA or MS Degree
- Other

Do you have health insurance? (Check one)

- Employer
- Self-pay
- Medicaid
- Medicare
- Through spouse/partner
- Through parent
- None
- Other

How did you hear about Stand by Me?

Have you or someone in your family been laid off, taken a pay cut or lost income due to Covid-19?

- No
- Yes
- N/A

Which of the following financial issues most concerns you right now? (Check one)

- Not being able to pay bills
- The amount of debt I have
- Not being able to save enough for retirement
- Cost of health care for myself or my family
- Taking a pay cut/loss of job/loss of income

Do you need additional resources or a referral related to COVID/Emergency assistance?

- Yes
- No

If yes, please check off all areas of assistance needed:

- Food assistance
- Employment assistance
- Rent assistance
- Foreclosure/Mortgage assistance
- Utility assistance
- Healthcare assistance
- Shelter or Homelessness resources
- Educational assistance for self or child

What is your sense of financial control?

- Total control
- Some control
- Neutral
- Little control
- No control



How often are you worried about your financial situation? (Check one)

- Never worried
- Rarely worried
- Neutral
- Occasionally worried
- Always worried

Have you had difficulty covering expenses in the last 6 months?

- Yes
- No

Are you currently or have you ever been homeless?

- Yes
- No

Have you missed more than one rent/mortgage payment in the last six months?

- Yes
- No

Have you ever borrowed from a payday lender or pawn shop?

- Yes
- No

How much do you have in savings?

\$ _____

Who is your real estate agent?(type none if you do not have one)

Name _____
Company _____

Who is your lender?(type none if you do not have one)

Name _____
Company _____

Who is your housing counselor?

Name _____
Housing counseling agency _____

Please check off the following that apply

I would like to work on increasing my income through Stand by Me workforce development

I need help with my resume

I would like to learn more about college funding, grants, and applying for FAFSA

I need help with existing college loans

I would like to work on saving for retirement

I would like more information on state benefits such as snap benefits, medicaid, or child care benefits

I am 50+ and would like to learn more about social security benefits, medicare, and late retirement planning

I currently have a small minority owned business and would like information on SBM MSB Grant

I would like to start a business

Please certify that all the information provided is correct or completed to best of your knowledge

X _____

Date: ____ / ____ / ____