

Name & Student ID:

NEXUS Financial Discipleship Center Data Intake Form

If you agree to participate in the financial coaching and planning project, the information collected on this form will be used in data analysis. Your name is not attached to your responses. If you do not agree to participate in the research, the information collected will only be used by your financial coach to facilitate your session. This research has been approved by the Institutional Review Board of Indiana Wesleyan University. Any questions should be directed to Justin.henegar@indwes.edu or 765-677-1934.

Please answer the following demographic questions about yourself.

Gender: ☐ Male ☐ Female

Age: _____

Ethnicity: ☐ White ☐ Hispanic ☐ Native American ☐ African American
☐ Asian ☐ Other (specify) _____

Marital Status: ☐ Single ☐ Married ☐ Divorced ☐ Separated ☐ Engaged

Grade Level: ☐ Freshman ☐ Sophomore ☐ Junior ☐ Senior ☐ Graduate Student

Major: _____

Academic College: _____

What is your current housing? ☐ On-campus ☐ Off-campus rent ☐ Off-campus own

How much does your current housing cost per month? _____

Are you the first person in your family to attend college? ☐ Yes ☐ No

Do you have any financially dependent children? ☐ Yes; how many? _____ ☐ No

Do you have any other financial dependents? ☐ Yes; how many? _____ ☐ No

Do you currently receive student loans? ☐ Yes ☐ No

Do you currently receive workstudy? ☐ Yes ☐ No

Do you currently receive a scholarship(s)? ☐ Yes ☐ No

Current Job Status: ☐ Full-time Job ☐ Part-time Job ☐ Seasonal Job ☐ No Job

Monthly Pay (Before Tax): \$ _____ **Monthly Take Home Pay:** \$ _____

Payment Frequency: ☐ Weekly Pay ☐ Biweekly Pay ☐ Monthly Pay ☐ Semi-monthly

If you lost your job today, how many months could you live using your savings? _____

How much in revolving credit card debt (debt that you don't pay off at the end of the month) do you currently owe? If none, please write \$0. If you do not have a credit card, please write n/a.

How much in student loans do you currently have? If none, please write \$0. _____

How much in auto loan(s) do you currently owe? If none, please write \$0. _____

How much in installment loan(s) (home appliances, electronics, furniture, etc) do you currently owe? If none, please write \$0. _____

Suppose you were to sell all of your major possessions (including your home), turn all of your investments and other assets into cash, and pay all of your debts. Would you be in debt, break even, or have something left over?

1 2 3 4 5
Be in serious debt Break even Have money left over

Please indicate the reason(s) for your visit. If you sought assistance for multiple reasons, please rank the reasons with 1 being the most important reason, 2 being the second most important reason, and so forth.

Overspending /Budgeting	_____	Need to Establish Credit	_____
Credit Report Questions	_____	Too Much Debt	_____
Behind in Monthly Payments	_____	Rent/Mortgage Questions	_____
Financial Aid Questions	_____	Unexpected Financial Crisis	_____
Student Loan Counseling	_____	Medical Expenses	_____
Considering Bankruptcy	_____	Unemployment	_____
Repayment of Loans	_____	Set up Savings Plan	_____
Settle Old Debts	_____	Gambling	_____
Other	_____	(Please specify)	_____

Please indicate how you heard about our services:

Friend	_____	Relative	_____	Classmate	_____
Brochure	_____	Career Center	_____	Guest Speaker	_____
Housing/Dining	_____	Financial Aid Office	_____	Other IWU Office	_____
Counseling Center	_____	IWU Student	_____	Student Life	_____
Newspaper Article	_____	Academic Advisor	_____	Resident Assistant	_____
Center Website	_____	IWU Employee	_____	E-mail	_____
Employee Program	_____	Sidewalk Chalking	_____	IWU organization	_____
Instructor	_____				
Other	_____	(Please specify)	_____		

Anything else we should know about your situation:

