PREPARE + PROSPER

FINANCIAL REFERRALS

Check in on your financial health and build your financial well-being with these resources. Check the boxes below to be referred to other Prepare + Prosper (P+P) programs, or to one of our trusted partners. Use these free resources to help navigate your financial life.

Preferred name(s): _____
(Taxpayer) (Spouse)

Phone number: _____ Email address: _____

Money Mentors Financial Coaching: A P+P financial coach is a volunteer who helps you set a financial goal and works with you over six months to develop a plan to reach it.

- ☐ I want to work with a financial coach monthly to help me reach my financial goal(s).

Credit Services: P+P can help you access your free credit report or (re)build your credit.

- ☐ I want to fill out a request form today to receive a copy of my free credit report by mail.
- ☐ I have little or no credit history and want to start building credit using a credit building loan.

LSS Financial Counseling: Financial Counselors are experts in helping people with very specific debt challenges.

- ☐ I am having trouble paying my student loans and/or understanding repayment options.
- ☐ I am struggling to manage my credit card debt.

Pro bono Financial Planning: A Certified Financial Planner CFP© is a financial expert who can meet with you for a one-time consultation on any of the following topics:

- ☐ Retirement distribution options.
- ☐ Developing a retirement savings plans.
- ☐ Appropriate life insurance coverage.
- ☐ Managing inherited assets.
- ☐ Opening a 529 College Savings plan.

Other financial issues you want to discuss with Certified Financial Planner:

- ☐ I am not interested in any of the programs or services outlined here.

Consent to share information: By signing below, I give Prepare + Prosper consent to share the above contact information with the organization(s) I am requesting referrals for. Your consent is valid for one year from today.

Signature: _____ Date: _____