theWEALTH COACH FOR WOMEN
PURPOSE DEFINED. LIFE DESIGNED.

THE FINANCIAL FREEDOM POWER HOUR

Client Intake Form

Therese R. Nicklas, CFP® | Wealth Coach for Women

Congratulations on taking this step.

The Financial Freedom Power Hour is designed entirely around you — your life, your vision, and your next chapter. The more honestly and openly you complete this form, the more powerful our time together will be.

There are no right or wrong answers. ***Just your answers.***

Please complete and return this form at least 48 hours before our scheduled conversation.

SECTION 1 ABOUT YOU

First Name	Last Name

Preferred Name (what would you like me to call you?)

Email Address

Phone Number

Street Address

City	State / Zip

Marital Status:

☐ Single ☐ Married ☐ Divorced ☐ Widowed ☐ Partnered

Dependents:

Children (names and ages)	Parents or others in your care

SECTION 2 YOUR CURRENT ROLE

Understanding where you are before we talk about where you're going

1. **Describe your current role. What do you do, and how long have you been doing it?**

2. **What do you love most about your work?**
   What will you genuinely miss when this chapter closes?

3. **What are you most looking forward to offloading?**
   The meetings, the pressure, the politics — what can't you wait to leave behind?

4. **How would you describe your relationship with your work right now?**
   Are you energized, burned out, somewhere in between?

SECTION 3 WHERE YOU ARE TODAY

The facts — so we can build from a place of clarity, not assumption

5. **Where are you in your retirement timeline?**
   Have you circled a date? Are you still figuring it out? Have you already retired?

6. **What brought you here today?**
   Something shifted — what was it? What made you decide this conversation was worth your time?

7. On a scale of 1-10, how confident do you feel about your financial future right now?

1 = I lose sleep over it. 10 = I feel completely prepared for whatever comes next.

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ 6 ☐ 7 ☐ 8 ☐ 9 ☐ 10

What would move your number higher?

SECTION 4 YOUR VISION

This is the True Wealth section — the things money can't buy

8. If all your time was free tomorrow — how would you want to spend it?

Don't edit yourself. Don't think about what's realistic. Just write what you truly want.

9. **What does your big, bold, abundant next chapter look like?**
   Travel, family, purpose, passion projects — paint the picture. What does a life of True Wealth mean to you?

10. **What legacy do you want to leave?**
    Think beyond finances — community, charity, family, impact. How do you want to be remembered? What do you want to contribute?

SECTION 5 FEARS & UNCERTAINTIES

This is a safe space — the more honest you are, the more I can help

11. What keeps you up at night when you think about your financial future?

Nothing is too big or too small. Write it all down.

12. Is there a decision you've been putting off?

Something you know you should address but haven't? A conversation you've been avoiding?

13. Where do you feel least clear or least confident right now?

Income, investments, retirement timing, identity, something else entirely?

SECTION 6 WHAT SUCCESS LOOKS LIKE

So I know exactly what our hour together needs to deliver

14. What do you most need to walk away from our conversation knowing?

If you could answer one question by the end of our hour — what would it be?

15. How will you know this was worth your time and investment?

What does a successful outcome look and feel like for you?

FINANCIAL DATA

PLEASE PROVIDE THE FOLLOWING SO I CAN ASSESS YOUR CURRENT SITUATION

CURRENT SAVINGS ACCOUNT BALANCE	
RETIREMENT ACCOUNT BALANCE	
OTHER INVESTMENT ACCOUNT BALANCE	
ESTIMATED ANNUAL SOCIAL SECURITY BENEFIT	
ESTIMATED ANNUAL PENSION BENEFIT	
MORTGAGE BALANCE	
CREDIT CARD BALANCE	
AUTO LOAN BALANCE	
OTHER DEBT BALANCES	
AVERAGE MONTHLY COST OF LIVING	
AVERAGE NET MONTHLY INCOME	

Thank you for taking the time to complete this form with care and honesty.

I will review your answers carefully before we meet — so every minute of our hour together is focused entirely on you, your situation, and your next chapter.

Please return this form at least 48 hours before your scheduled appointment.

I look forward to our conversation.

Therese R. Nicklas, CFP® | Wealth Coach for Women

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Financial Security Is NOT Your Income. Know Where You Stand … Never Shrink To Fit.