



Biblical Principles, Inc. Date _____ Form 13
Biblical Budget Counseling Session Guideline and Checklist
Client Name _____ Date _____

The counselor should prepare counseling room prior to client's arrival. Adjust thermostat to comfortable level, position chairs where you want client to sit, arrange your material so that you are well organized, and be sure to freshen up yourself particularly your breath. You should have tissues handy and bottles of water. Two hours is a long time.

1. ____ Greet and Make Client Comfortable
2. ____ Position Client so They Can See Documents.
3. ____ Journal Client (s) Name, Mailing Address, Phone & Email
4. ____ Ask Client (s) Goal for Session, Record on Form 11
5. ____ Continue Conversation As Needed to Build Rapport
6. ____ Ask to review Client (s) Form 1 and Verify Information
7. ____ Continue Conversation to Discuss Occupation, etc.
8. ____ Clarify Faith Statement if Necessary
9. ____ Review, Correct or Complete Financial Statement as Needed
10. ____ Review Status of the Will and Document Suggestions on Form 11
11. ____ Review Health Insurance and Document Suggestions on Form 11
12. ____ Review Life Insurance and Document Suggestions on Form 11
13. ____ Give Overall review of Form 1 and Solicit Client For Questions
14. ____ Assist Client in Completion of Form 2, Begin by Explaining
15. ____ Require Client to Complete Portions Not Relating to Payroll or Tithe
16. ____ While Client Does 14, You Develop Information from Pay Stub
17. ____ Use This Time to Analyze Their Tax Return & Current Withholding
18. ____ When Client Finishes Form 11, You Fill in Income, Tithe and Taxes
19. ____ Calculate Spending Budget and Then You Other Post PR Deductions
20. ____ Review Spending Posted by Client for Reasonableness & Discuss
21. ____ Calculate Total Expenses & Determine Surplus or Deficit
22. ____ Verify That Client Agrees with Analysis and Proceed if Accurate
23. ____ Determine Adjustments Needed By Comparing Actuals to Guidelines
24. ____ If Adjustments Needed Begin Form 3
25. ____ Consider Each Form 3 Entry for Adjustment By Contrasting to Form 2
26. ____ For Each Adjustment Make a Corresponding Note on Form 11
27. ____ If Debt Reduction Plan is Needed Try to Provide Funding on Form 3
28. ____ If Debt Reduction Plan is Needed Then Go to Form 4
29. ____ Enter Data Needed for Consumer Credit or Loans
30. ____ Use Blank Column Heading to Develop Snowball Information
31. ____ Calculate How Long Snowball Plan Will Take
32. ____ Obtain Client Ownership in Overall Biblical Budget Plan
33. ____ Solicit additional Concerns Client Might Have and Address
34. ____ Discuss Need for Follow Up and Schedule If Necessary
35. ____ Pray with Client, Asking Client to Participate or to Lead Prayer
36. ____ You Pray for Client, Remember to Thank God for Being in Ministry
37. ____ Be Sure to Return All Records & Forms to Client

BLESSED IS THE MAN WHO FINDS WISDOM