|  |
| --- |
| Office use |
| **Opening date:** |  | **Referred by:** |  |
| **Client number:** |  | **Work & Income no:** |  |
| **Interviewed by:** |  | **Assigned to:** |  |

|  |
| --- |
| Client details |
| **Name:** |  |
| **Age/DOB:** |  | **Gender:** |  |
| **Ethnicity:** |  | **Phone:** |  |
| **Iwi:**  |  | **Email:** |  |
| **Address:** |  |
| **Main form of income:** (Circle one) | Wages / salary | Benefit | Other:  |
| **Partner’s name:**  |  |
| **Partner’s address:** (If different from above) |  |
| **Housing type:**(Circle one) | Renting or flatting | Own home with mortgage | Sharing housing / boarding | Renting to Housing NZ | Own home freehold | Other: |
| **Ages of other people in the house:** |  |
| **Previous budgeting advice?** (Circle one) | Yes  | No | If yes, who with? |  |
| Goals the client wants to achieve with: |

|  |
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| **Client waiver** |
| In accordance with the Privacy Act 2020, I understand that this information is to be recorded. It has also been explained to me that my file may be inspected by a representative of our contract provider for the purposes of a quality review of this service. I understand that in rare cases the Ministry of Social Development may request my file be transferred to either themselves or another budgeting provider. |
|  | Day | Month | Year |  | Day | Month | Year |
| Client signature |  | Adviser signature |  |
|  |  |  |  |
| Office use |
| **Closed date:** | Day | Month | Year | **Adviser name:** |  |
| **Client name** **/ number:** |  | **Total hours spent:** |  |
| **Reason for closure:**(Circle one) | Needs met | Client withdrew needs not met | Referred on | Service ceased assisting | Other: |



|  |
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| **Completion details** |
| **Client type:**(Circle one) | One-off | Ongoing |  |  |  |  |
| **Specialist advice:** | SIO | NAP | Bankruptcy | TMM | Other money management | Other: |
| **Did the client achieve their goals?** | Yes | No |  |  |  |
| If yes, how? If not, why not? |
|  |  |  |  |  |  |  |
| **Total presenting debt breakdown:** |  |
| 1. Government departments | $ | 6. Retail goods / store cards | $ |
| 2. Courts | $ | 7. Professional services | $ |
| 3. Communications | $ | 8. Bank loans / credit cards | $ |
| 4. Utilities | $ | 9. Finance company loans / cards | $ |
| 5. Accommodation / rent / board | $ | 10. Mortgages | $ |
|  |  | 11. Family or other type of loan | $ |
| **Financial achievement:** |
| Presenting debt: | $ | Presenting arrears: | $ |
| Debt repaid: | $ | Arrears retired: | $ |
| Payments made by the client or otherwise settled | Payments made by the client or otherwise settled |
| Debt retired: | $ | Arrears written off: | $ |
| Through insolvency | Through insolvency |
|  |  |
| **Evidence of greater financial confidence and competence** |
|  |