

Please take a moment and provide us with information that will help us to improve future coaching sessions. Please enter your information and responses below.

Please fill in circles completely and DO NOT use check marks.

**What is your Student ID (Ex: 01234567)?**

1<sup>st</sup> Digit (0) (1) (2) (3) (4) (5) (6) (7) (8) (9)

2<sup>nd</sup> Digit (0) (1) (2) (3) (4) (5) (6) (7) (8) (9)

3<sup>rd</sup> Digit (0) (1) (2) (3) (4) (5) (6) (7) (8) (9)

4<sup>th</sup> Digit (0) (1) (2) (3) (4) (5) (6) (7) (8) (9)

5<sup>th</sup> Digit (0) (1) (2) (3) (4) (5) (6) (7) (8) (9)

6<sup>th</sup> Digit (0) (1) (2) (3) (4) (5) (6) (7) (8) (9)

7<sup>th</sup> Digit (0) (1) (2) (3) (4) (5) (6) (7) (8) (9)

8<sup>th</sup> Digit (0) (1) (2) (3) (4) (5) (6) (7) (8) (9)

In ONE word, describe what money means to you:

What is your #1 financial goal right now?

**Most important issue(s) to be discussed:**

- Discuss student loan repayment options
- Discuss post-graduation budgeting plan
- Other (please describe):

**How did you hear about Exit Counseling sessions?**

**Grade yourself on your following core money management skills:**

Ability to Organize Finances

**A B C D F**  
(A) (B) (C) (D) (F)

Ability to Achieve Financial Goals

(A) (B) (C) (D) (F)

Ability to Maintain a Budget/Spending Plan

(A) (B) (C) (D) (F)

Please select a response below for each item using the following scale: 1= Strongly Disagree, 2=Disagree, 3=Neutral, 4=Agree, 5=Strongly Agree

**Statement**

I have a good understanding of how to create or maintain an organizational system.

Strongly Disagree (1) Disagree (2) Neutral (3) Agree (4) Strongly Agree (5)

I have a good understanding of how to create and accomplish financial goals.

(1) (2) (3) (4) (5)

I have a good understanding of how to create and stick to a budget.

(1) (2) (3) (4) (5)

I feel prepared to make good financial decisions.

(1) (2) (3) (4) (5)

I feel my money management skills are strong.

(1) (2) (3) (4) (5)

I feel confident in my financial future.

(1) (2) (3) (4) (5)

I feel prepared to handle financial struggles.

(1) (2) (3) (4) (5)

**Please respond to the following statements AFTER your consultation at the SMMC**

**Statement**

I have a good understanding of how to create or maintain an organizational system.

Strongly Disagree (1) Disagree (2) Neutral (3) Agree (4) Strongly Agree (5)

I have a good understanding of how to create and accomplish financial goals.

(1) (2) (3) (4) (5)

I have a good understanding of how to create and stick to a budget.

(1) (2) (3) (4) (5)

I feel prepared to make good financial decisions.

(1) (2) (3) (4) (5)

I feel my money management skills are strong.

(1) (2) (3) (4) (5)

I feel confident in my financial future.

(1) (2) (3) (4) (5)

I feel prepared to handle financial struggles.

(1) (2) (3) (4) (5)

What did you learn from your coaching session?

Please share additional comments about your coaching session:

<b>Student Name:</b>	<b>Date:</b>	<b>Money Coach:</b>
Student Loan Repayment Checklist		
<input type="checkbox"/> <b>NSLDS account login</b>	<a href="http://www.nslds.ed.gov/nslds_SA/">http://www.nslds.ed.gov/nslds_SA/</a> (Financial Aid Review)	
<input type="checkbox"/> <b>Repayment Plans handout</b>	<a href="http://studentaid.ed.gov/repay-loans/understand/plans">http://studentaid.ed.gov/repay-loans/understand/plans</a>	
<input type="checkbox"/> <b>Paybacksmarter website review</b>	<a href="http://www.paybacksmarter.com">http://www.paybacksmarter.com</a>	
<input type="checkbox"/> <b>Studentloans.gov website review</b>	<a href="https://studentloans.gov/myDirectLoan/index.action">https://studentloans.gov/myDirectLoan/index.action</a>	
<input type="checkbox"/> <b>Online Exit Counseling instructions</b>	myUNT – To Do List	

My SMMC Action Plan:		
<b>Top 3 Tasks</b>		<b>Deadline:</b>
1		
2		
3		
4	Schedule a follow up coaching session	

My Referrals			
√	Department/Organization	Contact Person	Location/Phone/Email
○			
○			
○			

My Notes