LEGACY PERSONAL FINANCES

INFORMATION

Getting Started

Intake Form

Option 1: Complete online at cognitoforms.com

Option 2: Complete paper form and send to LPF by text to 562-548-1365, e-mail at LegacyPersonalFinances@gmail.com, or mail to PO Box #18618, Long Beach, CA 90807.

Set an Appointment

Option 1: Call or text LPF at 562-548-1365

Option 2: Email LPF at LegacyPersonalFinances@gmail.com

Option 3: Give us your information in the Contact Us section of our website LegacyPersonalFinances.com.

Services

Coaching

Clients are able to speak to someone about their finances and have their questions, answered and their concerns, eased. When setting an appointment, best practice is to inform representative what is the desired topics for the session so that the advisor can be most efficient.

Fee. A $25 non-refundable fee is charged per session.

Bookkeeping

There are two main packages offered. Package 1 is one session. Clients will have an in-depth meeting outlining their income versus expenses to create a budget or tracking system for them to follow when LPF is not there to monitor their finances. Package 2 is a monthly session (or period of time to be determined by you, more than every 2 months). Clients will also have an initial in-depth meeting. Then LPF will also update the system monthly and remind Clients of important bills, depts, savings, and goals as these are important aspects of a good financial plan.

Fees. Package 1 is $100. Package 2 price varies depending on time period but the first month is $100 and for monthly updates $25 per month. Price goes up the more time you put in between updates.

Accounting

LPF offers accounting services to small businesses and non-profits.

Fees. Price will vary from $100 to $400 a month based on your business's needs. A free consultation meeting is conducted to assess those needs.

Tax Preparation

LPF provides tax preparation counseling by reviewing previously submitted taxes and information from coaching or bookkeeping session. We prepare personal and business taxes.

Fees. For simple preparation (taxes with three forms or less) $100. For complicated taxes $200.

**Cases can be made for financial hardship and sliding scale accommodations can be discussed.*

INTAKE FORM

Applicant

First Name: ________________ Middle Name: _____________ Last Name: _____________

Gender: ___________________ Birth Date: ________________ Social Security: _________

Daytime Phone: ____________ Evening Phone: _____________ E-mail: _______________

Address: __________________ City: _____________________ State/Zip: ______________

Number of Dependents: ___ Number in Household: ___ Marital Status: ________ Military: ____

Highest Education Level: ___________ Ethnicity: _____________ Housing: ___________

Co-Applicant

First Name: ________________ Middle Name: _____________ Last Name: _____________

Gender: ___________________ Birth Date: ________________ Social Security: _________

Daytime Phone: ____________ Evening Phone: _____________ E-mail: _______________

Address: __________________ City: _____________________ State/Zip: ______________

Number of Dependents: ___ Number in Household: ___ Marital Status: ________ Military: ____

Highest Education Level: ___________ Ethnicity: _____________ Housing: ___________

Employment

Applicant

Employer: ____ ___F/T ___P/T

Position: ___________________________ Gross Pay: ___________ Net Pay: ___________

___ Salaried ___ Hourly ___ SSI ___ Pension ___ Other

Pay Period: __Daily __ Weekly __ Bi-Weekly __ Semi-Monthly __ Monthly

Additional Employment: ________________________________ Additional Income: _________

Co-Applicant

Employer: ____ ___F/T ___P/T

Position: _____________________________ Gross Pay: ____________ Net Pay: ____________

___ Salaried ___ Hourly ___ SSI ___ Pension ___ Other

Pay Period: __Daily __ Weekly __ Bi-Weekly __ Semi-Monthly __ Monthly

Additional Employment: ________________________________ Additional Income: _________

Money

Home Loan: ____________ Auto Loan: ____________ Student Loan: ___________

Taxes Owed: ____________ Savings Acct.: _________ Checking Acct.: ___________

Credit Cards: _________ Other: ____________