

Client Intake Form

Please complete all fields. Information is kept strictly confidential.

Personal Information

Full Legal Name: _____

Date of Birth: _____

Social Security #: _____

Current Address: _____

City / State / ZIP: _____

Phone: _____

Email: _____

Employment

Employer: _____

Occupation: _____

Length of Employment: _____

Monthly Income: _____

Credit Goals

What are you hoping to accomplish? (e.g., buy a home, qualify for a car loan, lower interest rates, rebuild after hardship)

Credit History

- Have you ever filed for bankruptcy? Yes No
- Are there any collections, charge-offs, or judgments? Yes No
- Have you previously worked with a credit repair company? Yes No
- Do you currently have access to your credit reports? Yes No

Documents to Provide

- Government-issued photo ID (driver's license, state ID, or passport)
- Proof of address (utility bill, lease, or bank statement dated within 60 days)
- Social Security card or W-2
- Most recent credit reports from all three bureaus (if available)

Authorization & Consent

I authorize Her Financial Fix to access my credit reports, communicate with credit bureaus and creditors on my behalf, and submit disputes regarding inaccurate information. I certify that all information provided in this intake is true and accurate to the best of my knowledge. I understand that no specific results are guaranteed.

Client Signature: _____

Date: _____