



## Referral / Intake form

### For Financial Mentoring / Budget Advice

#### Client's details

Name:		Ethnicity:	
Age:		Gender:	
Email:		Phone:	
Address:			
Main form of income:	Wages / salary	Benefit	Other:

#### Present concerns re budget


#### Housing (circle one)

Renting or flatting, Own home with mortgage, Sharing housing / boarding, Renting to Housing NZ, Own home freehold, Other:

#### Number of people in the house

	Ages:
	DOB of youngest child:

#### Previous budgeting advice

Previous budgeting advice?	Yes / No	If yes, who with?	
Comments:			

#### Client waiver

In accordance with the Privacy Act 1993, Principles 3(b) and 11(d), 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.

Client signature	Date	Referrer Name	Referrer Organisation

#### Family Works use:

Intake Date:		Assigned to:	
Client No:		Work and Income no:	
Financial Mentoring:		Money Mates:	