

Minerva New Client Form

Welcome! We're so excited to be working with you. This form helps us gather some preliminary information before the first session. We'll use this to gather some data on where you are so we can develop a plan to help you reach your goals most effectively.

So let's start with the basics... Let us know who you are, how you like to be contacted, and what you hope to get from these sessions.

* Required

1. Email address *

2. What do you like to be called? Enter your name and pronouns here. *

3. What is the best phone number to use? *

4. What is the best snail mail address to use? *

5. How did you hear about us? *

6. Are you interested in financial support for your business, your personal life, or both? *

Mark only one oval.

- Business only
- Personal only
- Both business and personal
- Something else
- I'm not sure

7. What type of support interests you? *

Check all that apply.

- A one-time session to answer a few specific questions
- A few sessions to make sure things are on track
- Getting a "snapshot" of my financial health
- A group learning opportunity

8. How would you define success for these sessions? Feel free to be as detailed or as vague as you like. *

9. I acknowledge that Elaine will send a written summary of our meeting afterwards, along with an invoice for \$110, which is payable within 30 days. *

Mark only one oval.

- Yes

Business Details

Here's where we get some basic information about your work... Don't worry if you don't know these answers. We can work on them together. (And thanks for your patience if you've already answered them.)

10. What do you do? Describe your work in your own words. *

11. How long have you been doing this type of work? *

12. What category best describes you? *

Check all that apply.

- Visual artist (fine artist, crafter, designer, etc.)
- Performing artist (dancer, actor, musician, etc.)
- Literary artist (playwright, writer, poet, spoken word, etc.)
- Educator

Other: _____

13. Where can we find you online? Enter your website and social media details here.

*

14. Do you have a separate business entity? *

Check all that apply.

- No, I work as a sole proprietor.
- Yes, I have an LLC.
- Yes, I have an S Corporation.
- Yes, I have a non-profit.
- Yes, I have a hybrid entity (L3C or B Corporation)
- Yes, but I'm not sure what I have.
- I have no idea what you are asking.

15. Is anyone else involved in the business? *

Check all that apply.

- Nope, it's just me.
- Yes, I have formal partners or co-owners.
- Yes, I hire contractors.
- Yes, I have employees.
- Sort of; I do some bartering here and there.

Other: _____

**KAIR
Index**

We use the KAIR Index (Knowledge, Action, Intention, and Results) to get a snapshot of financial wellness. We'll ask you about your perception of your own knowledge, habits, sense of control, and metrics. (This helps us focus our time on what you really need.)

16. How knowledgeable do you feel about money overall? *

Mark only one oval.

- I'm clueless.
- I'm sort of knowledgeable, but I have a ton of questions.
- I'm pretty informed, but there are one or two things I could use clarity on.
- I'm an expert.

17. Why did you choose that answer? *

18. How often do you take action to manage your financial health? *

Mark only one oval.

- I never take action, and I have no idea what to do.
- I take action occasionally, but it tends to be reactive instead of proactive.
- I usually take action on a regular basis, but I'm not sure if I'm doing everything I could be doing.
- I have excellent financial habits. I know what to do, and I do it.

19. Why did you choose that answer? *

20. How much control do you feel you have over your financial situation? *

Mark only one oval.

- None
- A little
- Some
- Enough

21. Why did you choose that answer? *

22. Are there key metrics you pay attention to in the business to measure success? *

Mark only one oval.

- No. I have no idea what this means.
- Kind of. Usually I look at whether or not I earn money.
- Mostly. I have one or two things I try to pay attention to on a regular basis.
- Yes. I have 3-5 key metrics I track on a regular basis to see how things are going.

23. Why did you choose that answer? *

Financial
Details -
Business

Now let's talk money, specifically in the context of your business or your creative practice. (We'll talk about personal finance soon.) If something doesn't apply, feel free to enter n/a.

24. How much does the business earn each year (ish)? *

25. What are your total business expenses each year (ish)? *

26. How much is in the business's emergency reserve fund? *

27. How much debt does the business have? *

28. What types of debt does the business have? *

Check all that apply.

- Credit card debt
- Loans from friends or family
- Business loan from a bank or credit union
- Loan to purchase property or equipment

Other: _____

29. What protections does the business have in place? *

Check all that apply.

- A separate bank account just for the business
- Standard contracts
- Business liability insurance
- Intellectual property protections (copyright, trademark, patents)
- Short-term insurance policies (like for a show, shipping, or a performance)
- Worker's compensation insurance

Other: _____

Financial
Details -
Personal

Knowing a bit about your personal financial health can help inform our conversations about your creative practice (and vice versa). If something doesn't apply, feel free to enter n/a.

30. Describe who is part of your household and your financial role within it. *

31. What is the household's total income, from all sources, each year (ish)? *

32. How does the household earn income each year? *

Check all that apply.

- My business
- Income I earn outside my business
- Income from my spouse/partner/family
- Investment income (including real estate)

Other: _____

33. What are the household's total expenses each year (ish)? *

34. How much is in the household's emergency reserve fund? *

35. How much debt does the household have (ish)? *

36. What types of debt does the household have? *

Check all that apply.

- Mortgage
- Home equity line of credit
- Car loan
- Credit card debt
- Student loan debt
- Medical debt
- Personal loans (from friends or family)

Other: _____

37. Which types of protections do you have in place for the household? *

Check all that apply.

- Health insurance
- Disability insurance
- Life insurance
- Car insurance
- Homeowner's / Renter's insurance
- Will / Power of attorney

Other: _____

Final Thoughts

38. Is there anything else you'd like to add? *

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