

IDA Coaching Referral Checklist

Client Name: _____ Coach Name: _____ Date: _____

Which IDA? (select one) Home Purchase Home Repair Rental Education Auto

Have you submitted at least 2 months tracked budgeting? Yes No

Is the budget feasible long term? Yes No

What are the client's income source(s)? _____

What is the average disposable income over last 2 months? _____

Did you review paystubs or bank statements with the client? Yes No

Was the client engaged and interested in budgeting? Yes No

Did they miss or were late to appointments? Yes No If so, how many missed? _____

Did you work on other areas other than budgeting? Yes No

If so, what areas? _____

Why do you believe the client is ready to start an IDA?