7 questions to help your client start talking about money

It’s hard to talk about money. Especially with your caseworker. Here are questions that can help get the conversation started. Keep it positive. Keep it proactive.

1. Have you filed your income taxes?

2. Would you like to review other government programs and services you might be eligible for?

3. Do you have a spending plan (budget)? Do you track or review expenses?

4. Do you feel your debt is manageable?

5. Have you any challenges with meeting your financial obligations?

6. Do you have questions about borrowing money, spending plans or other financial topics?

7. Have you reviewed your credit report in the last year?