



# FTP Consulting Solutions

## Budget Coach Application

**Start Date:** \_\_\_\_\_

### Customer Information

Full Name: \_\_\_\_\_ Date: \_\_\_\_\_  
*First Last M.I.*

Address: \_\_\_\_\_  
*Street Address Apartment/Unit #*

\_\_\_\_\_  
*City State ZIP Code*

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Were you referred? If so, by whom?

Are you Single or Married?

How many accounts do you and/or your spouse have?

How many financial institutions do you bank with?

How often do you receive income?  
(Weekly/Bi-Weekly/Monthly)

What's your average pay check amount?

What are your financial future goals?

Best Method of Contact?  
Email/Phone/Text

### Privacy Disclaimer

#### Privacy Notice

**Effective Date: May 1, 2018**

This privacy notice discloses the privacy practices for **FTP Consulting Solutions** and the procedures.

#### Information Collection, Use, and Sharing

We are the sole owners of the information collected from the clients. We only have access to/collect information that you voluntarily give us via email or other direct contact from you. We will not sell or rent this information to anyone.

We will use your information to respond to you, regarding the reason you contacted us. We will not share your information with any third party outside of our organization, other than as necessary to fulfill your request.

Unless you ask us not to, we may contact you via email in the future to tell you about specials, new products or services, or changes to this privacy policy.

**Your Access to and Control Over Information**

You may opt out of any future contacts from us at any time. You can do the following at any time by contacting us via the email address or phone number provided on our social media page:

- See what data we have about you, if any.
- Change/correct any data we have about you.
- Have us delete any data we have about you.
- Express any concern you have about our use of your data

**Registration**

In order for us to start your program, a client must first complete the application form. During registration a user is required to give certain information (such as name and email address). This information is used to contact you about the products/services on our social media page, in which you have expressed interest. At your option, you may also provide demographic information (such as gender or age) about yourself, but it is not required.

**Orders**

We request information from you on our application form. To start your consulting services with us, you must provide contact information (like name and address) and financial information (like credit card number, expiration date). This information is used for billing purposes and to fill your services. If we have trouble processing your payment, we'll use this information to contact you.

**Security**

We take precautions to protect your information. When you submit sensitive information via email, your information is protected both online and offline. **WE WILL NEVER ASK FOR YOUR SOCIAL SECURITY NUMBER.** Wherever we collect sensitive information (such as credit card data), that information will be encrypted and transmitted to us in a secure way. While we use encryption to protect sensitive information transmitted online, we also protect your information offline. Only employees who need the information to perform a specific job (e.g. billing or customer service) are granted access to personally identifiable information. The computers/servers on which we store personally identifiable information are kept in a secure environment.

**Surveys & Contests**

From time-to-time our social media requests information via surveys or contests. Participation in these surveys or contests is completely voluntary and you may choose whether or not to participate and therefore disclose this information. Information requested may include contact information (such as name and shipping address), and demographic information (such as zip code, age level). Contact information will be used to notify the winners and award prizes. Survey information will be used for purposes of monitoring or improving the use and satisfaction of this site.

**Notification of Changes**

*Whenever material changes are made to the privacy notice specify how you will notify consumers.*

**Other Provisions as Required by Law**

Numerous other provisions and/or practices may be required as a result of laws, international treaties, or industry practices. It is up to you to determine what additional practices must be followed and/or what additional disclosures are required. Please take special notice of the Illinois Privacy Protection Act (IPPA), which is frequently amended and now includes a disclosure requirement for "Do Not Track" signals.

**If you feel that we are not abiding by this privacy policy, you should contact us immediately via telephone at 331-208-7387 or via email at [info@ftpconsultingsolutions.com](mailto:info@ftpconsultingsolutions.com)**

**Disclaimer and Signature**

*By signing this document, I am allowing FTP Consulting Solutions to budget and financial plan for I or /my spouse. I certify that all the above information is correct and accurate to the best of my abilities.*

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Spouse or partner: \_\_\_\_\_ Date: \_\_\_\_\_