

Personal Financial Service Provider Plan

Name: _____

Last Updated: _____

Date Prepared: _____

1. Personal Financial Needs Assessment

Identify and prioritize your current and future financial service needs.

Primary Financial Goals

What are your most important financial goals for the next 1-5 years?

Financial Service Needs

Check all services you currently need or anticipate needing in the next 1-5 years:

- | | |
|---|---|
| <input type="checkbox"/> Checking Account | <input type="checkbox"/> Savings Account |
| <input type="checkbox"/> Credit Card | <input type="checkbox"/> Debit Card |
| <input type="checkbox"/> Student Loan | <input type="checkbox"/> Auto Loan |
| <input type="checkbox"/> Mortgage | <input type="checkbox"/> Personal Loan |
| <input type="checkbox"/> Retirement Account | <input type="checkbox"/> Investment Account |
| <input type="checkbox"/> Financial Planning | <input type="checkbox"/> Insurance |
| <input type="checkbox"/> Mobile Banking | <input type="checkbox"/> Online Bill Pay |

Other financial services needed:

Service Priority Ranking

Rank your top 5 financial service needs in order of importance to you (1 = most important):

Rank	Financial Service	Why This Is Important to You
1		
2		
3		
4		
5		

2. Personal Preferences and Values

Consider what matters most to you in a financial service provider.

Rate the Importance of Each Factor

For each factor below, rate its importance to you when selecting a financial service provider (1 = Not Important, 5 = Extreme Important):

Low Fees	<input type="radio"/> 1	<input type="radio"/> 2	<input type="radio"/> 3	<input type="radio"/> 4	<input type="radio"/> 5
Convenient Locations	<input type="radio"/> 1	<input type="radio"/> 2	<input type="radio"/> 3	<input type="radio"/> 4	<input type="radio"/> 5
Online/Mobile Services	<input type="radio"/> 1	<input type="radio"/> 2	<input type="radio"/> 3	<input type="radio"/> 4	<input type="radio"/> 5
Customer Service	<input type="radio"/> 1	<input type="radio"/> 2	<input type="radio"/> 3	<input type="radio"/> 4	<input type="radio"/> 5
Interest Rates	<input type="radio"/> 1	<input type="radio"/> 2	<input type="radio"/> 3	<input type="radio"/> 4	<input type="radio"/> 5
Range of Services	<input type="radio"/> 1	<input type="radio"/> 2	<input type="radio"/> 3	<input type="radio"/> 4	<input type="radio"/> 5
Reputation/Trustworthiness	<input type="radio"/> 1	<input type="radio"/> 2	<input type="radio"/> 3	<input type="radio"/> 4	<input type="radio"/> 5
ATM Network	<input type="radio"/> 1	<input type="radio"/> 2	<input type="radio"/> 3	<input type="radio"/> 4	<input type="radio"/> 5
Educational Resources	<input type="radio"/> 1	<input type="radio"/> 2	<input type="radio"/> 3	<input type="radio"/> 4	<input type="radio"/> 5
Socially Responsible Practices	<input type="radio"/> 1	<input type="radio"/> 2	<input type="radio"/> 3	<input type="radio"/> 4	<input type="radio"/> 5

Deal Breakers

What factors would immediately eliminate a financial service provider from your consideration?

3. Financial Service Provider Options

Identify potential financial service providers that match your needs and preferences.

Provider Types to Consider

Based on your needs assessment, which types of providers should you research?

- | | |
|--|--|
| <input type="checkbox"/> Traditional Bank | <input type="checkbox"/> Credit Union |
| <input type="checkbox"/> Online Bank | <input type="checkbox"/> Investment Firm |
| <input type="checkbox"/> Insurance Company | <input type="checkbox"/> Financial Advisor |
| <input type="checkbox"/> Fintech Company | <input type="checkbox"/> Other: _____ |

Specific Providers to Research

List specific providers you plan to research further:

Provider Name	Provider Type	Why You're Considering Them

4. Provider Comparison Matrix

Use this matrix to directly compare financial service providers based on your priority factors.

Comparison Factor	Provider 1:	Provider 2:	Provider 3:
Account Fees	_____	_____	_____
Minimum Balance Requirements	_____	_____	_____
Interest Rates (Savings)	_____	_____	_____
Interest Rates (Loans)	_____	_____	_____
Location Convenience	_____	_____	_____
ATM Network	_____	_____	_____
Mobile/Online Banking Features	_____	_____	_____
Customer Service Reputation	_____	_____	_____
Available Products/Services	_____	_____	_____
Special Features/Benefits	_____	_____	_____
Insurance/Security	_____	_____	_____
Other: _____	_____	_____	_____

Pros and Cons Analysis

Provider	Pros	Cons
Provider 1: _____	_____	_____
Provider 2: _____	_____	_____

Provider 3:

5. Questions to Ask Providers

Prepare a list of specific questions to ask each provider you're considering.

Required Documentation and Information

List any documentation or information you'll need to gather before opening accounts:

6. Decision and Implementation Plan

Based on your research and comparison, outline your financial service provider decisions.

Selected Provider(s)

You may choose different providers for different needs.

Financial Service Need	Selected Provider	Specific Product/Account	Key Terms/Features

Implementation Timeline

Outline the steps and timeline for setting up your accounts/services:

Action Step	Target Date	Notes

7. Relationship Management Plan

Outline how you will manage and evaluate your relationship with your financial service provider(s) over time.

Regular Review Schedule

How often will you review your financial services to ensure they still meet your needs?

Success Metrics

How will you measure whether your financial service provider is meeting your needs?

Trigger Events for Re-evaluation

What life events or circumstances would cause you to re-evaluate your financial service providers?

Note: This plan is for educational purposes only and does not constitute financial advice. Your personal financial situation unique, and you should consult with qualified financial professionals before making significant financial decisions.

PFL Academy - Chapter 3.1: Understanding Different Types of Financial Service Providers