

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:

- ☐ Checking Account
- ☐ Savings Account
- ☐ Credit Card
- ☐ Debit Card
- ☐ Student Loan
- ☐ Auto Loan
- ☐ Mortgage
- ☐ Personal Loan
- ☐ Retirement Account
- ☐ Investment Account
- ☐ Financial Planning
- ☐ Insurance
- ☐ Mobile Banking
- ☐ 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 = Extremely Important):

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

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?

- ☐ Traditional Bank
- ☐ Credit Union
- ☐ Online Bank
- ☐ Investment Firm
- ☐ Insurance Company
- ☐ Financial Advisor
- ☐ Fintech Company
- ☐ 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

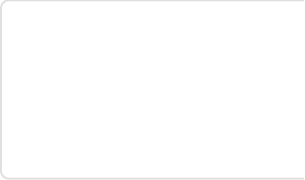
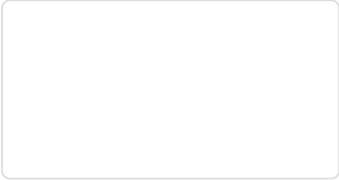
Use this matrix to directly compare financial service providers based on your priority factors.

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: _____	<div></div>	<div></div>
Provider 2: _____	<div></div>	<div></div>

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/Featur

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 is 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