Completing this document gets your situation “out of your head and onto paper.” Things can seem overwhelming in your own mind, but often seem manageable when they’re spelled out in an orderly way. Use a “just the facts” approach as you complete this document. We will build on it in future lessons.

**Part 1: Employment Situation**

|  |  |
| --- | --- |
| Are you currently employed? |  |
| If yes, how long do you expect to be employed? |  |
| Do you have (or do you expect) a severance package? |  |
| If yes, what amount of money do you expect? |  |
| Have you applied for other jobs? How many? What has been the result so far? |  |
| If you are currently unemployed, how long have you been unemployed? |  |

**Part 2: Family Situation**

*Do you have:*

|  |  |
| --- | --- |
| Young children? How many / ages? |  |
| Older children preparing for college? How many / ages? |  |
| Adult children in college or in need of support? How many / ages? |  |
| Aging parents or other family members who require care or financial support? |  |

**Part 3: Financial Situation**

*Do you have:*

|  |  |
| --- | --- |
| Spousal income? |  |
| Liquid savings? (cash) |  |
| Other savings? (e.g. retirement accounts) |  |
| Health insurance? |  |
| If you had no income, how long could you sustain your lifestyle before “major changes” were required? |  |

**Part 4: Freelancing Experience**

|  |  |
| --- | --- |
| Have you ever freelanced before? What was your experience with it? Direct with a client or through another party? |  |
| Do you regularly freelance, but maintain a full-time job (e.g. always have a client or two “on the side”)? |  |
| Are you a full-time freelancer? Are you making the money you want to be making? Do you have the relationships you want to be having? Do you feel that clients respect your skills? |  |

**Part 5: Contractual Obligations**

*Do you have:*

|  |  |
| --- | --- |
| Non-compete agreements? If so, what are the basic details? |  |
| Confidentiality agreements? If so, what are the basic details? |  |
| Other contractual business commitments? |  |

**Part 6: Industry Experience**

|  |  |
| --- | --- |
| List the industries you’ve worked in through your career: (e.g. healthcare, aerospace, CPG, etc.) |  |

**Part 7: Company Experience**

|  |  |
| --- | --- |
| List the names of organizations you’ve worked for: |  |
| List the names of organizations you’ve *contracted* for: (e.g. they were your client, but you were not a full-time contractor or employee) |  |

**Part 8: Educational Background**

|  |  |
| --- | --- |
| List any higher-educational institution where you received a degree: |  |
| List any higher-educational institution where you did NOT receive a degree: (e.g. took a course) |  |
| List the names of at least three professors you could contact from those experiences: |  |
| List the names of at least one alumni association you could connect or reconnect with: |  |

**Part 9: Groups and Associations**

|  |  |
| --- | --- |
| List any groups or associations where you are a member (e.g. interest groups, professional organizations, religious groups, etc.) |  |
| List the names of at least three groups or associations you could join  |  |

**Part 10: Social Media Profiles**

*Add links to your social media profiles below. If you do not have one, enter “N/A”.*

|  |  |
| --- | --- |
| LinkedIn |  |
| Twitter |  |
| Instagram |  |
| Facebook |  |
| YouTube |  |
| Medium (Blogging or other writing) |  |
| Reddit |  |
| Pinterest |  |
| Other |  |