

Appendix E: Activity Report for Approved Agencies

(Application for Approval as a Nonprofit Budget and Credit Counseling Agency)

Name of Agency: _____

Circle - Estimated or Actual

Total number of clients counseled during probationary or annual approval period.	
---	--

Certificates Issued and Fees/Contributions Collected:

Number Of Certificates Issued

During Probationary or Annual Approval Period

Counseling Methods*				Total Fee/Contribution
In-Person	Telephone	Internet		
			Certificates issued at no cost	\$
			Certificates issued at reduced cost	\$
			Certificates issued at regular cost	\$
			Total	\$

Debt Management Plans (DMP's):

Number of Debt Management Plans Administered

During Probationary or Annual Approval Period

DMPs active, start of reporting period	
New DMPs during reporting period (+)	
DMPs closed on completion of the plan during reporting period (-)	
DMPs closed prior to completion of the plan during reporting period (-)	
DMPs active, end of reporting period	
Percentage of credit counseling clients enrolled in DMPs	

*Combine Telephone and Telephone/Internet counseling methods and report under Telephone.