



Your Full Name Date of Birth Desired Retirement Age

Spouse Full Name Date of Birth Desired Retirement Age

Children: Names and Ages

Section 1 - Goals and Concerns

Bring spending under control Reduce and Eliminate Debt Reduce Taxes

Protect Assets Provide for Retirement Assist with Childrens/Grandchildrens Education

Wills and Trusts Social Security and Medicare/Medicaid Increasing Savings

Type below any other requests about goals and concerns

Section 2 - Monthly Income After Taxes Paid

	SELF	SPOUSE
Earned Income		
Social/Disability		
Alimony		
Hobby		
Pension		
Investment/Savings		
Other Income		
Total Income		



Section 3 - Savings and Investments

Account Provider	Account Type	Account Value	Monthly Contribution
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Section 4 -Homes and Property

Property Type	Valuation	Loan Balance	Monthly P&I	Loan Type	Term Left	Int %
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Any other assets, or expected assets like art and antique collections, know inheritances,



Section 5 - Other Loans and Debts

Loan Issuer	Amount Owed	Interest %	Minimum Payment	Actual Payment
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Any Other debts or non standard loans or commitments

Section 6 - Planning and Protection

Last Will and Testament	Living Will	Irrevocable/Revocable Trusts	Estate and Legacy Planning
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	Life Insurance Self	Life Insurance Spouse
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Death Benefit

Cash Value

Monthly Premium

Type