Name: _____

Phone: _____ _____

Age / DOB: _____ _____

Employer: _____ Income: $ _____

Employer: _____ Income: $ _____

Other: _____ Income: $ _____

Retire on $_____ / Month @ Age _____

Date: _____

Checking, Savings, Money Markets, HSA's etc.	Individual Stocks, Investment Property, Other

IRA, 403B, Private Pension, Annuities, CD's, ROTH, etc.	Mutual Funds, Brokerage Accounts, Variable IRA's, 401K, etc.

PROPERLY STRUCTURED DEBT

Mortgage Balance: $ _____

Home Equity Loan: $ _____

Value of Home: $ _____

Payment: _____ Rate: _____

Payment: _____ Rate: _____

	Balance	Payment
Car(s)	_____	_____
Credit Card(s)	_____	_____
Loans	_____	_____
Student Loan	_____	_____
Other	_____	_____
Other	_____	_____
Other	_____	_____

ESTATE PLAN

☐ Will

☐ Living Will

☐ POA with HCR

☐ Trust

Other: _____

_____

EDUCATION

Age: _____

College Fund

_____

_____

_____

_____

How much could you comfortably afford to set aside monthly to reach your dreams and goals

$_____

PROVIDE ADEQUATE PROTECTION

Healthcare

Premium: $ _____

Deductible: $ _____

Out-of-Pocket Max: $ _____

Co-pay: $ _____

Check included items:

☐ Dental ☐ Vision ☐ Drugs

Other: _____

Life Insurance

Insured: _____

Type: _____

Death Benefit: $ _____

Premium: $ _____

Insured: _____

Type: _____

Death Benefit: $ _____

Premium: $ _____

Disability

Short-Term Premium: $_____

Long-Term Premium: $ _____

Long-Term Care

Premium: $ _____

Benefit Period: _____

Property and Casualty Insurance

Auto Premium: $ _____

Auto Deductible: $ _____

Home Premium: $ _____

Home Deductible: $ _____

Other: _____