



Client Name

Client DOB

Spouse Name

Spouse DOB

Statements are needed to complete the information below to confirm principal balance, interest rate, promotional rate, minimum payment and actual payments.

Mortgages

Primary Residence

Balance	Interest Rate	Principal & Interest Payment	Monthly Overpayment
		(Not including taxes and insurance)	(additional payments to principal)

Additional Property

Balance	Interest Rate	Principal & Interest Payment	Monthly Overpayment
		(Not including taxes and insurance)	(additional payments to principal)

Total Mortgage Overpayments Redirected

Consumer Debt

List all credit cards, personal loans, auto loans, home improvement loans and student loans.

Name	Balance	Interest Rate	Minimum Payment	Actual Payment
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Consumer Debt (continued)

Name	Balance	Interest Rate	Minimum Payment	Actual Payment
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Total Consumer Debt Overpayments Redirected

Investments

List all accounts that could help accelerate debt payoff and wealth building. (Roth IRA, Traditional IRA, 401k, 457, 403b, Savings)

Name	Type	Account Value	Monthly Contribution
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Total Investment Monthly Overpayments Redirected

Total Investment Lump Sum Redirected

Income

List all current and future income sources.

Name

Type

Monthly Income

Total Income Amount Redirected

Insurance

List all insurance policies.

Compay

Type

Rating

Monthly Premium Death Benefit

Cash Value

Total Insurance Monthly Monthly Premium Redirected

Total Insurance Lump Sum Redirected

Total Inefficient Funds to be Redirected

Monthly Redirecting

Lump Sum Redirecting

Mortgage

Consumer Debt

Investments

Income Sources

Insurance Policies

TOTAL