

# CLIENT SUITABILITY

Name:

D.O.B:

Email address:

LIQUID ASSETS		NON- LIQUID ASSETS	
Checking/Saving	\$	Cash Value in L.I	\$
Money Market	\$	IRA/Qualified Plan	\$
Certificate of Deposit	\$	Pension	\$
Mutual Funds	\$	Real Estate Equity	\$
Stocks/Bonds	\$	Other	\$
IRA/Qualified Plan	\$		
Pension	\$		
Other	\$		
Annuities (out of surrender)	\$	Annuities (out of surrender term)	\$
Cash and Precious Metals	\$	Annuities (in surrender term)	\$
<b>Total Liquid Assets</b>	<b>\$</b>	<b>Total Non-Liquid Assets</b>	<b>\$</b>
	\$		

Household Monthly Income	SS	Pension	Disability	<b>TOTAL:</b>
Monthly Expenses	<b>TOTAL:</b>			