Date\_\_\_\_\_\_\_\_\_\_\_\_\_\_

***Confidential Financial Information***

**Client Name**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**Date of Birth**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Spouse Name**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**Date of Birth**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Mailing Address**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**City**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**State**\_\_\_\_\_\_\_\_**Zip**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Phone**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**Cell**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**Work\_\_\_**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**E-Mail**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Children**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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**(C) Retirement Date**\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_ **Planned Retirement Date\_\_\_\_\_\_**\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Employer**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**(S) Retirement Date**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**Planned Retirement Date\_\_\_\_\_\_**\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Employer**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Do you have a current Will**: Y or N **Date Last Updated**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Attorney**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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**CPA**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

***Real Estate Owned***

**Property Address** **Cost$**  **Value$**  **Debt/Income**

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***Retirement Accounts***

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**Account Location TYPE Value**

**(Bank, Broker, Employer, ECT...) (401(k), TSA, CD)**

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***Banks…Savings & Loans…Credit Unions***

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**Institution** **Type of Acct.** **Maturity Date** **Interest Rate** **Value**

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***Brokerage Accounts***

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**Brokerage Firm Value**

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***Direct Stocks, Bonds, Mutual Funds***

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**Stock, Bond or Fund Family Shares Value**

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**Annuities**

**(Fixed, Variable or Indexed)**

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**Company Annuitant Rate% Date Opened Value**

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***Life Insurance***

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**Company Insured Type Death Ben. Cash Value Prem.**

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***Long Term Car Insurance***

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**Are you concerned about a Nursing Home Expenses: Y or N**

**Company Daily Benefit Elimination # of Years Inflation Other Premium**

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_ $\_\_\_\_\_\_

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***Auto & Home Insurance***

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**Company Auto**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**(C) DL**#\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ **(S) DL**#\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**Tickets or Violations 5yrs**: Y or N

**Auto Make**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Yr\_\_\_\_ **Limits:** 25/50 50/100 100/300 250/500

**Auto Make**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Yr\_\_\_\_ **Comp / Collision** Deduct: 100 250 500 1000

**Auto Make**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Yr\_\_\_\_ **Towing/ Rental:** Y or N **Current Premium $\_\_\_\_\_**

***Auto & Home Insurance***

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**Company Home\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Coverage amount**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**Year Built**\_\_\_\_\_\_\_\_\_\_**Sq Feet**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Basement**: Y or N **Finished%**\_\_\_\_\_\_\_\_ **Garage #**\_\_\_\_\_\_\_\_\_\_**Bathrooms#**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Roof Type**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**Replaced Yr**.\_\_\_\_\_\_ **Claims in 5yr: Y or N**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Deductible:** 250 500 1000\_\_\_\_\_\_\_\_\_\_\_\_\_ **Current Premium$** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

***Limited or General Partnerships***

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**Partnership Investment Value**

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***Promissory Notes & Trust Deeds***

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**Name of Debtor Interest Rate Balance of Note**

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***Other Assets***

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***Income***

***\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_***

***(C)* Wages $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Social Security $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**(S) Wages $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Social Security $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**(C) Other $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Source\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**(S) Other $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Source\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Approximate Monthly Expenses: $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**What are your primary financial Concerns? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

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***Notes***

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