

TFRA CLIENT PROFILE

A ONE LIFE AMERICA RESOURCE

Name: _____ DOB: ____/____/____ Gender (M/F): _____

Employment: _____

Number of Years At Current Position: _____ Retirement Age: _____

Annual Income/Monthly Income: _____

Retirement Accounts (Types): _____

Monthly/Annual Contributions: _____

Current Account Values: _____

Old IRA's (401K's etc.): _____

Risk Tolerance: _____

Tax Beliefs (up or down): _____

Retirement Account Notes:

Life Insurance (Y/N): _____ Face Amount: _____ Type: _____

Issue Date: _____ Cash Value: \$ _____ Monthly Premium: \$ _____

Mortgage (Y/N): _____ Current Loan Amount: \$ _____ Payoff Date: _____

Spouse Name: _____ Employed: _____

Retirement Accounts: _____ Monthly Contribution: _____

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Life Insurance: _____

Spouse Notes: _____

Children: _____

College Planning: _____

FUTURE RETIREMENT EXPECTATIONS

Age: _____

Necessary and Desired Monthly Income: _____

Retirement Lifestyle: _____

Future Retirement Notes: _____

NEXT APPOINTMENT: ____/____/____