

Pre-Retiree Cornerstones Blueprint™

Family Information

Last Name: _____ Date: _____ Phone: _____
 Email: _____ Address: _____
 First Name DOB Age Occupation Salary Commissions & Bonuses Total Income

Loans & Property Values

Name/Type	Property Value (if applicable)	Unpaid Balance	Payment Amount	Interest Rate	Remaining Payments
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Income Protection

Disability/Long Term Care Insurance	Ann Prem	Benefit Amt or %	Benefit Period	Waiting Period
Life Insurance	Ann Prem	Death Benefit	Cash Value	Yr Purchased
Health Insurance	Ann Prem	Group/Ind.		

Property & Liability Protection

	Premium	Liability Limit	Deductible
Umbrella			
Car			
Home/Renter's			

Final Affairs Protection

Type	Year Established
Survivor Life Insurance	Ann Prem Death Benefit Cash Value Yr Purchased

Annual Savings

Total Annual Pre-Tax Savings = _____
 Total Annual After-Tax Savings = _____

Assumed Tax Rate: _____%

Liquid Assets

Total Liquid Asset Annual Savings = _____
 After-Tax = _____/yr

Account	Personal Annual Savings	Current Balance
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(Short Term)

Retirement Assets

Total Retirement Asset Annual Savings = _____
 Pre-Tax = _____/yr After-Tax = _____/yr

Account	Personal Annual Savings	Employer or Other Savings	Current Balance
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(Long Term)

Permanent Life Insurance

Total Permanent Life Insurance Annual Savings = _____
 After-Tax = _____/yr

Account	Personal Annual Savings	Current Death Benefit	Current Cash Value
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(Long Term)