FINANCIAL INFORMATION

Client Name(s):													
FAMILY INFORMATION													
Client 1	First Name		DOB			ccupation	Sala	Salary		Commissions and Bonuses		Total Income	
Client 2 Child Child Child													
Child													
LOANS AND DEBTS													
Туре			Unpa	Unpaid Balance		Monthly Payment		Inte	Interest Rate %		Months Left to Pay		
CAR/HOME/UMBRELLA INSURANCE Uninsured/Underinsured													
Liabi		Liabili	ty Limits		Onn	Limits			Deductible		A	Annual Premium	
Home/Renter's													
Umbrella	Umbrella												
LIFE INSURANCE													
Purcha		Year Purchase	ed	I Type/C		Company		Death Benefit		Annual Premium		Cash Value	
Client 1													
Client 2													
Children													
DISABILITY AND/OR LONG TERM CARE INSURANCE													
	Type/Source Annual P								fit Period		Waiting Period		
Client 1													
Client 2													



SAVINGS AND INVESTMENTS: TYPES OF ACCOUNTS						
Checking	Fixed Annuities	403b/TSA	Corporate Bonds	Businesses		
Savings	401k	Profit Sharing Plan	Stocks	Home		
Money Markets	Roth 401k	Deferred Comp.	Variable Annuities	Real Estate		
CD's	IRA	Government Bonds	Indexed Annuities	Tax Shelters		
Savings Bonds	Roth IRA	Municipal Bonds	Mutual Funds	Other		

SAVINGS AND INVESTMENTS							
Ownership		Current	Annual Personal	Annual Employer or Other	Additional Information		
(Client 1-2, Joint, etc.)	Account Type	Value	Contribution	Contribution	for Account		

Wills/Trusts:	Yes/No	Year Established:	Up-To-Date: Yes/No	
Additional Notes:				

