

Personal Financial Planning Profile

Please fill out the next three pages and gather the documents listed on the last page.

If you have scheduled a **Financial Jump Start**, please mail, Fax, upload or drop off the information two weeks before your appointment.

The information you provide is strictly confidential and will not be disclosed to anyone without your consent.

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Personal Financial Planning Profile

General Information

Today's date: _____

Client's name: _____

Co-Client's name: _____

Birth Date: _____

Birth Date: _____

Address: _____

Phone Numbers: _____ (home) _____ (work)

Preferred E-Mail Address: _____

How did you hear about us? _____

Please check one: Single Married Divorced Widowed Other

Children:

Name

Birthdate

Client

Co-Client

Please check: Employed Self-Employed
 Retired

Employed Self-Employed
 Retired

Occupation: _____

Financial Planning Priorities and Goals

What are your three most important financial concerns or goals?

1. _____

2. _____

3. _____

Asset Information *Please estimate the value of the following:*

Checking, Savings/CD, Money Market Funds \$ _____
Retirement Accounts (IRA's, 401(k)'s 403(b)'s, etc.) \$ _____
Your Home \$ _____ Other Real Estate \$ _____
Stocks, Bonds \$ _____ Mutual Funds \$ _____
Other Assets \$ _____

Liability Information *Please estimate the value of the following:*

Primary Mortgage \$ _____ Other Mortgages \$ _____
Installment Loans \$ _____ Credit Cards \$ _____
Other Liabilities \$ _____

Annual Earned Income

Salary(ies) \$ _____ Commission \$ _____
Bonus \$ _____ Other Income \$ _____

Is income fairly uniform and reliable? Yes No

Contributions

Are you contributing on a regular basis to a retirement plan such as 401(k), 403(b) or deferred compensation, or to an IRA? Yes No

Life Insurance

How much life insurance do you have?

Client \$ _____ Co-Client \$ _____

Wills

Do you have a will(s)? _____ Date Signed: _____

Please continue →

Other Information

How much do you expect to earn on your investments?

6-8% _____ 8-10% _____ 10-12% _____ 12-15% _____ 15% + _____

What did you do the last time the stock market went down by 5% or more?

Have you ever been unhappy with the recommendations of a stockbroker, insurance agent and/or financial adviser or consultant? _____ If yes, please explain:

Is there any other information you would like to provide at this time?

Please provide the following documents two weeks before your Financial Tune-Up:

- Tax returns for last two years
- Most recent brokerage/mutual fund statement(s)
- Most recent retirement plan and Social Security statement(s)
- Most recent IRA, 401(k), 403(b) or Deferred Compensation statement(s)
- Any other relevant financial documents

Signed: _____

Date: _____

Thank you