

Personal and Contact Information



Marital Status: Single Married Divorced Widowed

First name: _____ Spouse's first name: _____
Middle name: _____ Spouse's middle name: _____
Last name: _____ Spouse's last name: _____
Date of birth: _____ Date of birth: _____
Home phone: _____ Cell: _____ Home phone: _____ Cell: _____
Email: _____ Email: _____
Street Address: _____ Street Address: _____
City: _____ City: _____
State: _____ Zip: _____ State: _____ Zip: _____

Professional Contact Information:

Accountant name: _____ Email: _____ Phone: _____
Estate Planning Attorney: _____ Email: _____ Phone: _____

Other Information:

Do you have Long Term Care Insurance? Yes No Insurer: _____
Do you own Life Insurance? Yes No Insurer: _____
Do you own Health Insurance? Yes No Insurer: _____
Do you own Disability Insurance? Yes No Insurer: _____
Do you have a Will? Yes No Last updated: _____
Do you have a Trust? Yes No Last updated: _____

Beneficiary Information:

Name	Relationship	Date of Birth
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Retirement Goals:

Check all that apply

Income Income + Growth Growth Aggressive Growth

Additional comments:

Concerns or Fears:

Check all that apply

- Inflation
 Pandemic
 Running Out of Money

Additional comments:

Income:

	Client	Spouse
Employer	_____	_____
Current Gross Annual Salary	_____	_____
Projected Retirement Date	_____	_____
Social Security Benefits	_____	_____
Pension	_____	_____
Survivor Pension	_____	_____
Real Estate	_____	_____
Investment Income	_____	_____

Assets:

(Investment types: stocks, bonds, mutual funds, CD's, checking, savings, money market)

Owner	IRA/Non-IRA	Investment Type	Account Value
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Annuities:

Owner	Company	IRA/Non-IRA	Payout?	Account Value
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

Other: Gold, Silver, Cash, Coins, etc...

Real Estate:

Owner	Company	Description	Value
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

“It’s not hard to make decisions when you know what your values are.”

-Roy Disney

Values:

My top 3 value words: _____

Spouse top 3 value words: _____

**Below is a sample of values often expressed.
 This list is intended to inspire you, not limit your self expression**

- | | | |
|------------|---------------|-------------|
| Freedom | Security | Love |
| Energy | Respect | Recognition |
| Generosity | Joy | Fulfillment |
| Faith | Adventure | Creativity |
| Happiness | Independence | Abundance |
| Honor | Comfort | Dignity |
| | Peace of Mind | Beauty |