

FINANCIAL INFORMATION

	<u>You</u>		<u>Spouse</u>	
	<u>Monthly</u>	<u>Total</u>	<u>Monthly</u>	<u>Total</u>
Savings	\$ _____	\$ _____	\$ _____	\$ _____
IRA's	\$ _____	\$ _____	\$ _____	\$ _____
401k	\$ _____	\$ _____	\$ _____	\$ _____
TSA	\$ _____	\$ _____	\$ _____	\$ _____
Mutual Funds	\$ _____	\$ _____	\$ _____	\$ _____
Stocks	\$ _____	\$ _____	\$ _____	\$ _____
Bonds	\$ _____	\$ _____	\$ _____	\$ _____
Other	\$ _____	\$ _____	\$ _____	\$ _____

Satisfied with amount accumulated? _____ yes _____ no

Interested in other options? _____ yes _____ no

Amount that can be set aside: \$ _____ _____ monthly _____ weekly

Goals and Objectives

- ___ Understand your net worth
- ___ Understand your household budget
- ___ Provide adequate income for your family in the event of premature death
- ___ Fund your family's education goals
- ___ Provide for a secure retirement
- ___ Minimize excessive estate settlement and inheritance taxes
- ___ Provide for potential long-term care costs
- ___ Maximize contributions to your retirement program while minimizing current taxes
- ___ Accumulate money for a specific event/need _____
- _____
- Other _____

ADDITIONAL COMMENTS
