Growing and Protecting Your Net Worth

CLIENT INFORMATION – FINANCIAL DATA

DATE:
Name:

Total Personal Income

Income from Salary/Business:
Income from Investments:
Social Security:
Pension:
Rental Property Income:
Alimony/Child Support:
Inheritance:
Total Household Income:
Income Tax Rate:
Bankruptcy last 5 years:

Investments/Accounts

Employer's Retirement Account/401k:
IRA:
Roth IRA:
Non-IRA:
Cash:
Collectables (art, coins, cars, etc.):
Other assets:

Insurance

Life Insurance:
Disability Insurance:
Long Term Care Insurance:
Annuities:
Health/Medicare:
Auto, Home, Business:

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Client Financial Data – page 2

Date:
Name:

House and Auto Expenses

Home purchased for: $ date:
Current Value: $
Home Equity: $
First Mortgage: $ Payment ($/mo):
Other Loans: $ Payment($/mo):
School Loans: $ Payment($/mo):

Cars –
Owned? Value:
Mortgage amount: Payment($/mo):
Lease payment($/mo):

Monthly Expenses

Utilities (electric, water, sewer, phone, cable, internet, etc.):
Food:
Car Payment:
Mortgage Payment:
Rent:
Home Maintenance:
Residential Association Fee:
Property Insurance:
Life Insurance:
Health Insurance:
Car Insurance:
Property Taxes:
Personal Medical Expenses, Pharmaceuticals:
Health Expenses paid for others:
Credit Card Debt: $ Payment: $
Education Funding for Children:
Other:

Law Suits, Liens, Creditor Actions:

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Client Financial Data – page 3
Date:
Name:

Total Net Worth:
Liquid Net Worth:

Discretionary Expenses
Travel:
Dining Out:
Entertainment:
Hobbies and Other Activities:
Charitable Contributions:
Special Events (i.e., wedding, new home or business):

Estate Planning – for Yourself, Your Family, Parents, Children –
Target Retirement Age:
Wills:
Trusts:
Power of Attorney:
Health Care Surrogate:
Living Will:
Updated Beneficiary Info. (date):

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