

***CONFIDENTIAL INFORMATION SHEET***

Name(s) Occupation Current age Today's Date

Address Phone Numbers

Home  
Work

Dependents (ages, special needs) Mobil

Email

Recent Marginal Income Tax Rate

Current Annual Income (list all sources)

Current Total Annual Expenses

Current Annual Saving Invested where?

Credit Card Debt (List each card with amount and interest rate)

Other Debt (e.g. mortgage, car loans, student loans)

Financial Goals and Time Frames (e.g. education expenses, home purchases)

Retirement Expectations

Age, Life Style Changes (e.g. reduced or increased expenses)

Current Assets (e.g. Taxable accounts, stocks, mutual funds, IRA's, 401k's) Current Values

Anticipated Assets (e.g. inheritance, gifts, lottery)

Do you have a will?