Financial Plan Services & Workbook

Client Name:

Financial Plan Level Desired

Base Plan

☐

Development Fee*
$500

Plan Services

- Budgeting & Cash Flow Management
- Insurance Planning
- Investment Management

Lifestyle Goals (Pg3)

- Up to 3

Core Plan

☐

Development Fee*
$1,000

Plan Services

- Budgeting & Cash Flow Management
- Risk Management & Insurance Planning
- College Funding Analysis
- Tax Planning
- Investment & Management
- Retirement Planning
- Legacy & Estate Planning Review -Wills, Trusts, Powers of Attorney
- Social Security Strategies

Lifestyle Goals (Pg3)

- Up to 6

Advanced Plan

☐

Development Fee*
$2,500

Plan Services

Same Services as Core Plan Plus the following:

- Business Succession Planning
- Stock Awards Planning
- Pension Strategies
- Legacy Planning
  - Charitable Giving
  - Philanthropic

Lifestyle Goals (Pg3)

- Up to 10

*The financial planning fees (fees) described above may increase or decrease depending upon the complexity of your individualized financial plan or the assets upon which your financial plan is based. Financial plans are sold pursuant to a Financial Planning Agreement (FPA) between The AmeriFlex® Group, an Independent Registered Investment Advisor and you, the client, pursuant to the terms and conditions contained therein. Please consult the fee listed on the FPA for the fee applicable to your financial plan. In the event of a discrepancy between the fees listed above and the fee listed on your FPA, the fee listed on your FPA will control.

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Personal Information

	You	Your Spouse or Partner
Full Name		
Date of Birth		

Children Information

Child's Name	Child's Spouse (If Applicable)	Child's Date of Birth	Names of Grandchildren

Retirement Age

	You	Your Spouse or Partner
Target Retirement Age (If Retired – N/A)		

Retirement Living Expenses

Estimated Monthly Retirement Living Expense (In Today's Dollars) *Use Figure From Monthly Cash Flow Worksheet*	$
Estimated Monthly Retirement Health Care Expenses *Use Figure From Monthly Cash Flow Worksheet*	$ ☐ Use National Averages

Be sure you don't "double count" any expenses during retirement.

For example, if you entered a separate goal for a car, don't include the purchase cost of this car in your living expenses, but do include all operating expenses (e.g. gas, taxes, maintenance).

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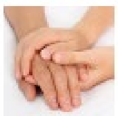
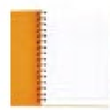
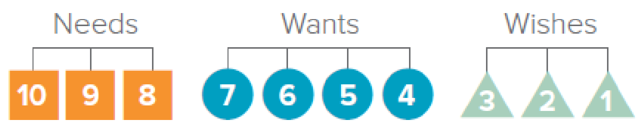
Lifestyle Goals – Before & During Retirement

	Travel		Car		Home Improvement
	College Education		Wedding		Celebration
	Gift - Donations		New Home		Major Purchase
	Provide Care		Leave Bequest		Anything Else

Goal Importance Scale



	Importance	Goal Description	Year	Target Amount	Frequency	How Many Times
Base Plan						
Core Plan						
Advanced Plan						
Example	8	Car Replacement	2024	$30,000	Every 8 Years	4 times

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Retirement Income

Social Security Benefits

	You	Your Spouse or Partner
Social Security Estimate		
Social Security Statement Provided	☐ Yes ☐ No	☐ Yes ☐ No
Social Security Number*		

*SSN Required for Financial Planning Agreement

Pension income (if available, provide your pension statement)

Description	Whose Pension is It?	Monthly Income	Yr it Ends or # of Years	% Survivor	Check if Inflates
					☐
					☐
					☐

Part-time work and other retirement income

Don't include interest or dividend income from your investments. Include income from part-time work, rental property, annuities, royalties, alimony, etc. All amounts are pre-tax and begin at retirement unless otherwise noted.

Description	You		Your Spouse or Partner	
	Monthly Income	Year it ends or # of Years	Monthly Income	Year it ends or # of Years

Other Assets to Fund Goals

Real Estate, Business Sale, Collectibles, Etc.

Description	Current Value	Sell to Fund Goals?	If Yes, What Year?	Est. Cash Received from Sale
		☐ Yes ☐ No		
		☐ Yes ☐ No		
		☐ Yes ☐ No		

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