UPLOAD LOGO

Client Profile

PERSONAL INFO

	Name	Gender	Year of Birth
Client		○ Male ● Female	
Co-Client		● Male ○ Female	

Children

Name	Year of Birth
1.	
2.	
3.	
4.	

GOALS

Retirement

	Retirement Age
Client	
Co-Client	

	Annual Dollar Amount
Ret. Expense	

Education

Student Name	Cost	Start Year
1.		
2.		
3.		
4.		

Other Goals

Description	Cost	Start Year	# of Years
1.			
2.			
3.			

ACCOUNTS & ASSETS

Bank Accounts/ Investment Accounts/Individual Retirement Accounts

Description	Account Type	Owner	Value	Annual Savings
1.				
2.				
3.				
4.				
5.				

Employer Sponsored Retirement Plans

Description	Type	Owner	Value	Annual Savings	Employer Match
1.					
2.					
3.					

Liabilities (Mortgage, Credit Cards, Car Loans, Student Loans, Personal Loans, etc.)

Description	Loan Type	Balance	Interest	Month. Payment	Orig. Date
1.					
2.					
3.					
4.					

Insurance Policies

Description	Type	Owner	Benefit
1.			
2.			
3.			

(Personal Home, Business, Car, etc.)

Description	Value	Description	Value
1.		3.	
2.		4.	

INCOME

Employment Income

Description	Earner	Salary
1.		
2.		
3.		

Social Security

	Name	Monthly PIA	Age to Begin
Client			
Co-Client			

Other Income (Pension, Rental Property Income, Annuity Income, etc.)

Description	Earner	Annual Amount	Year it Begins	Year it Ends
1.				
2.				
3.				

TAXES

Filing Status

○ Individual ○ Head of Household ○ Married, Filing Jointly ○ Married, Filing Separately

State of Residence

EXPENSES

Monthly Household Expenses		Annual Household Expenses
	OR	

*Feel free to add additional information on the back of this page.