



Agent Information

First Name:	Last Name:
Phone:	E-mail:

Client Information

Gender:	DOB:
State of Residence:	Marital Status:
Number of Children:	Target Retirement Age:

Planning Goals

Goal	Yes / No	Goal	Yes / No
Asset Diversification		Principal Protection	
Income Protection		Tax Deferred Growth	
LTC Protection		Wealth Transfer	

Bank & Brokerage Accounts

Institution	Account #	Balance	Qualified / NQ

Existing Annuity & Life Policies

Carrier	Policy Number	Cash Value	Issued Date	Surrender End Date

Comments / Notes:

Client Financial Profile

Household Income Details (Husband & Wife)

Monthly Earned Income		Monthly Unearned Income	
Salary/Draw		Social Security	
Bonus		Pension/Annuities	
Commissions		Dividends/Interest	
Other Earnings		Net Rentals	
		Other Unearned	
Total Earned Income		Total Unearned	

Total Monthly Income

Expense Details

Monthly Expenses Income			
Mortgage/Rent		Insurance	
Car/Gas		Food	
Medical		Travel	
Utilities		Miscellaneous	

Total Monthly Expenses

Assets & Liabilities

Assets		Liabilities	
Cash		Primary Mortgage	
CD(s)		Other Mortgages	
Annuities		Medical Debt	
Primary Residence		Personal Loans	
Other Real Estate		Credit Cards	
Business Equity		Other	
Stocks/Bonds/Mutuals			
Other Assets			
Total Assets		Total Liabilities	

Total Net Worth