



Confidential Planning Data Sheet

Date: \_\_\_\_\_

Name \_\_\_\_\_ DOB \_\_\_\_\_ SSN \_\_\_\_\_

Spouse \_\_\_\_\_ DOB \_\_\_\_\_ SSN \_\_\_\_\_

Home \_\_\_\_\_ Business \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Phone \_\_\_\_\_ FAX \_\_\_\_\_ Phone \_\_\_\_\_ FAX \_\_\_\_\_

E-mail \_\_\_\_\_ Cellular \_\_\_\_\_ Other \_\_\_\_\_

**Children (Names/Ages):**

**Grandchildren (Names/Ages):**

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Primary Goals/Objectives/Concerns:**

1) \_\_\_\_\_

2) \_\_\_\_\_

3) \_\_\_\_\_

4) \_\_\_\_\_

5) \_\_\_\_\_

<u>Assets</u>	<u>Est. Market Value</u>	<u>Title</u>	<u>Comments</u>
Cash/Savings/CD's/Money Market	_____	_____	_____
Stocks/Equities/Mutual Funds	_____	_____	_____
Taxable Bonds/Mutual Funds	_____	_____	_____
Tax-Free Bonds/Mutual Funds	_____	_____	_____
Qualified Plan Assets/IRAs	_____	_____	_____
Tax-Deferred Annuities	_____	_____	_____
Real Estate (Net Income _____ )	_____	_____	_____
Business Interest(s)	_____	_____	_____
Personal Residence (Mtge _____ )	_____	_____	_____
Other Assets _____	_____	_____	_____
<b>Estimated Net Worth</b>	<b>_____</b>		

**Life Insurance**

<u>Insured</u>	<u>Company</u>	<u>Amount</u>	<u>Owner</u>	<u>Beneficiary</u>	<u>Cash Value</u>	<u>Premium</u>
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____

Living Expenses, after taxes \_\_\_\_\_ Earned Income \_\_\_\_\_  
 Other Income \_\_\_\_\_ Source(s) \_\_\_\_\_

**DATA NEEDED FOR PRELIMINARY ASSESSMENT**

**Wills and Trust, Financial Statement, Tax Return, Insurance Policy(s), Investment Statements, Employee Benefits**