



Household Information

Client 1 Name\_\_\_\_\_

Preferred Name\_\_\_\_\_

M/F

DOB\_\_\_\_\_

Home Address \_\_\_\_\_

City \_\_\_\_\_

State \_\_\_\_\_

Zip Code \_\_\_\_\_

(Please Check Preferred)

☐ Home Phone \_\_\_\_\_

☐ Personal Email \_\_\_\_\_

☐ Mobile Phone\_\_\_\_\_

☐ Business Email \_\_\_\_\_

Client 2 Name\_\_\_\_\_

Preferred Name\_\_\_\_\_

M/F

DOB\_\_\_\_\_

(Please Check Preferred)

☐ Home Phone \_\_\_\_\_

☐ Personal Email \_\_\_\_\_

☐ Mobile Phone\_\_\_\_\_

☐ Business Email \_\_\_\_\_

Dependents

Name \_\_\_\_\_

M/F

DOB \_\_\_\_\_

Years Ed. \_\_\_\_\_

Name \_\_\_\_\_

M/F

DOB \_\_\_\_\_

Years Ed. \_\_\_\_\_

Name \_\_\_\_\_

M/F

DOB \_\_\_\_\_

Years Ed. \_\_\_\_\_

Name \_\_\_\_\_

M/F

DOB \_\_\_\_\_

Years Ed. \_\_\_\_\_

Goals

Client 1

Client 2

		Reduce Debt/Pay Off Mortgage			Own A Business
		Increase Cash Flow			Explore Estate Planning*
		Maximize Retirement Accounts			Standard of Living from Death/Disability
		Pursue Financial Independence			Explore Retirement Strategies
		Maximize Tax Advantages			Sell Your Home
		Fund College			Other Goals
		Buy New Home/Major Purchase			
		Build Savings for Unexpected Expenses			

\*World Financial Group Insurance Agency, Inc. and nor its agents may not offer legal advice. However, an agent may work with you and your legal professional to help implement, fund and review your Estate Plan.

Personal goals not mentioned above:

Frivolous Money:   Daily: \_\_\_\_\_

Weekly: \_\_\_\_\_

Employment & Income

Client 1 Employer: \_\_\_\_\_

Yrs: \_\_\_\_\_

Client 1 Occupation: \_\_\_\_\_

Client 2 Employer: \_\_\_\_\_

Yrs: \_\_\_\_\_

Client 2 Occupation: \_\_\_\_\_

Do you see yourself retiring from there?   Y/N

Have you reviewed your finances with a financial professional?   Y/N

Do you have an established budget?   Y/N

Current Income

Annual Salary

Net Take Home

Bonus, Commission

Rental Income

Interest, Dividends

Alimony/Child Support

Annuity/Pension Income

Other Income

Last Year's Tax Refund

Client 1

Client 2

Future Income

Military/Civil Retirement

Social Security/Pension

Debts

Description	Lender	Original Term	Year	Balance	IR	Min. Payment	Current Payment
Mortgage	_____	_____	_____	_____	____%	_____	_____
Auto Loan	_____	_____	_____	_____	____%	_____	_____
Auto Loan	_____	_____	_____	_____	____%	_____	_____
Student Loans	_____	_____	_____	_____	____%	_____	_____
Credit Card	_____	_____	_____	_____	____%	_____	_____
Credit Card	_____	_____	_____	_____	____%	_____	_____
Credit Card	_____	_____	_____	_____	____%	_____	_____
Credit Card	_____	_____	_____	_____	____%	_____	_____
Personal Loan	_____	_____	_____	_____	____%	_____	_____
Personal Loan	_____	_____	_____	_____	____%	_____	_____

Insurance

In addition to covering your final expenses, what tasks do you want your insurance to accomplish (Education savings for children, fund retirement, surviving spouse fund)?

Client 1:

Do you have Life Insurance?   Y/N

Provider: \_\_\_\_\_

Premium: \_\_\_\_\_

Term: \_\_\_\_\_

How did you arrive at that number? \_\_\_\_\_

Type: \_\_\_\_\_

Death Benefit: \_\_\_\_\_

Year Placed: \_\_\_\_\_

Riders: \_\_\_\_\_

Do you have Health Insurance?   Y/N

Provider: \_\_\_\_\_

Premium: \_\_\_\_\_

Term: \_\_\_\_\_

☐ Group   ☐ Individual

☐ HMO   ☐ PPO   ☐ Other: \_\_\_\_\_

Client 2:

Do you have Life Insurance?   Y/N

Provider: \_\_\_\_\_

Premium: \_\_\_\_\_

Term: \_\_\_\_\_

How did you arrive at that number? \_\_\_\_\_

Type: \_\_\_\_\_

Death Benefit: \_\_\_\_\_

Year Placed: \_\_\_\_\_

Riders: \_\_\_\_\_

Do you have Health Insurance?   Y/N

Provider: \_\_\_\_\_

Type: \_\_\_\_\_

Asset Accumulation (Preserve Your Estate)

Do you have a will?   Y/N

Last updated? \_\_\_\_\_

Taxable				Tax Deferred					Tax Advantaged			
Assets are generally positioned for current or short-term needs that can best be served with highly liquid investment instruments.				Assets are earmarked for long-term needs, such as college funding and retirement. Invested in less-liquid investments where any growth or interest is ultimately taxable at distribution.					Assets are positioned for the future since they receive preferential tax treatment during accumulation and at distribution.			
Investment/Asset Name	Balance	Monthly Contrib.	RoR	Investment/Asset Name	Balance	Monthly Contrib.	Employ Match	RoR	Investment/Asset Name	Balance	Monthly Contrib.	RoR
Mutual Funds				401(K)/403(B) or Other Qualified Plans					Roth IRA			
Stocks				IRA/SEP IRA					Cash Value Life Insurance			
Bank Savings/CDs				Annuities (Fixed/Variable)					Please note the following: Certain events and distributions may be subject to taxation and individuals would be responsible for the appropriate liability. This piece provides general information regarding the Internal Revenue Code and does not take into consideration specific state laws. World Financial Group Insurance Agency, Inc. and its agents may not provide tax or legal advice. Anyone to whom this material is promoted, marketed, or recommended should consult with and rely on their own independent tax and legal professionals regarding their particular situation and the concepts presented herein.			
Bonds/Treasuries				Savings Bonds								