

## Financial Information

### Annual Income:

Yours		Spouse
<input type="checkbox"/>	\$50,000 and Under	<input type="checkbox"/>
<input type="checkbox"/>	\$50,001 - \$100,000	<input type="checkbox"/>
<input type="checkbox"/>	\$100,001 - \$175,000	<input type="checkbox"/>
<input type="checkbox"/>	\$175,001 - \$250,000	<input type="checkbox"/>
<input type="checkbox"/>	Over \$250,000	<input type="checkbox"/>

### Total Life Insurance:

Yours		Spouse
<input type="checkbox"/>	\$100,000 and Under	<input type="checkbox"/>
<input type="checkbox"/>	\$100,001 - \$250,000	<input type="checkbox"/>
<input type="checkbox"/>	\$250,001 - \$500,000	<input type="checkbox"/>
<input type="checkbox"/>	\$500,001 - \$1,000,000	<input type="checkbox"/>
<input type="checkbox"/>	Over \$1,000,000	<input type="checkbox"/>

Mortgage: Balance: \$\_\_\_\_\_ Interest Rate: \_\_\_\_\_%  
 Original Mortgage Term: \_\_\_\_\_ Term (Years)  
 Years Remaining: \_\_\_\_\_

## Future Planning

In the near future I expect to:

Occupational	Personal	Financial
<input type="checkbox"/> Graduate	<input type="checkbox"/> Have a child	<input type="checkbox"/> Receive a raise or bonus
<input type="checkbox"/> Change job	<input type="checkbox"/> Adopt a child	<input type="checkbox"/> Have a CD mature
<input type="checkbox"/> Start a business	<input type="checkbox"/> Improve home	<input type="checkbox"/> Receive inheritance
<input type="checkbox"/> Receive a promotion	<input type="checkbox"/> Buy a home	<input type="checkbox"/> Borrow money
<input type="checkbox"/> Retire	<input type="checkbox"/> Care for parent	<input type="checkbox"/> Pay off a loan
	<input type="checkbox"/> Change marital status	<input type="checkbox"/> Purchase property
	<input type="checkbox"/> Become an empty nester	



Not a deposit | Not insured by any federal government agency | May lose value | No bank or credit union guarantee | Not FDIC/NCUA/NCUSIF insured

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A PERSONAL  
& CONFIDENTIAL  
**CHECKUP**

## Family Information

Name: \_\_\_\_\_

Are you a US citizen?  Yes  No

If no, what type of visa do you have? \_\_\_\_\_

Birthdate: \_\_\_\_\_ Tobacco User:  Yes  No

Spouse's Name: \_\_\_\_\_

Birthdate: \_\_\_\_\_ Tobacco User:  Yes  No

Children: \_\_\_\_\_ Age: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

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

\_\_\_\_\_

Own Home  Rent  Other

Email: \_\_\_\_\_

Daytime Phone: \_\_\_\_\_

Evening Phone: \_\_\_\_\_

Cell Phone: \_\_\_\_\_

Occupation: \_\_\_\_\_

Spouse's Occupation: \_\_\_\_\_

## My Feelings, Concerns & Goals

Please check what fits you best.:

	VI	SI	NI	NA
	Very Important	Somewhat Important	Not Important	Not Applicable
	VI	SI	NI	NA
1. Providing college funds for children is				
2. Paying off my home mortgage early to save thousands of dollars is				
3. Retirement planning is				
4. Insurance on myself, my spouse and children is				
5. Access to cash while living to help with unexpected medical expenses is				
6. If I became ill and was unable to work, a lump sum disability benefit would be				
7. Paying off my debts in the event of my death is				
8. Allowing my family to maintain their current lifestyle in the event of my death is				
9. Leaving a legacy for my loved ones is				
10. Receiving help with my overall planning is				

## Overall Planning

Please check what fits you best.:

	Yes	No	Don't Know
1. I have a current and valid will			
2. I have appointed a guardian for my children			
3. I keep my important papers in a safe or safe deposit box			
4. My family knows the location of my important papers			
5. I do a good job managing my income/expense flow			
6. I participate in a pension/profit sharing plan or 401K			
7. I am satisfied with the amount of money I have accumulated for my financial security			
8. I am aware of the financial impact a major illness could have on my family			
9. I have checked my Social Security benefits in the past 12 months			
10. I have accurately calculated the amount of money I need during my retirement years			