

Personal &
confidential
checkup



Family information

Name: _____ Home address: _____

Are you a US citizen? Yes No _____

If no, what type of visa do you have? _____ Own Home Rent Other

Birthdate: _____ Tobacco user: Yes No Email: _____

Spouse's Name: _____ Daytime phone: _____

Birthdate: _____ Tobacco user: Yes No Evening phone: _____

Children: _____ Age: _____ Cell phone: _____

_____ Age: _____ Occupation: _____

_____ Age: _____ 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
Providing college funds for children is				
Paying off my home mortgage early to save thousands of dollars is				
Retirement planning is				
Insurance on myself, my spouse and children is				
Access to cash while living to help with unexpected medical expenses is				
If I became ill and was unable to work, a lump sum disability benefit would be				
Paying off my debts in the event of my death is				
Allowing my family to maintain their current lifestyle in the event of my death is				
Leaving a legacy for my loved ones is				
Receiving help with my overall planning is				

Overall planning (Please check what fits you best)

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

Financial information

Annual Income:		
Yours		Spouse
	\$50,000 and under	
	\$50,001 - \$100,000	
	\$100,001 - \$175,000	
	\$175,001 - \$250,000	
	Over \$250,000	

Total Life Insurance:		
Yours		Spouse
	\$100,000 and under	
	\$100,001 - \$250,000	
	\$250,001 - \$500,000	
	\$500,001 - \$1,000,000	
	Over \$1,000,000	

Mortgage: Balance: \$ _____ Interest Rate: _____ %

Original Mortgage Term: _____ Years Years Remaining: _____

Future planning - in the near future I expect to (Please select all that apply)

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

Policies issued by **American General Life Insurance Company (AGL)**, Houston, TX except in New York, where issued by **The United States Life Insurance Company in the City of New York (US Life)**. **AGL does not solicit, issue, or deliver policies or contracts in the state of New York.** Guarantees are backed by the claims-paying ability of the issuing insurance company and each company is responsible for the financial obligations of its products. Products may not be available in all states and features may vary by state. Please refer to the policy for more information.

All companies above are wholly owned subsidiaries of Corebridge Financial, Inc. Corebridge Financial and Corebridge are marketing names used by these companies.

This material is general in nature, was developed for educational use only, and is not intended to provide financial, legal, fiduciary, accounting, or tax advice, nor is it intended to make any recommendations. Applicable laws and regulations are complex and subject to change. Please consult with your financial professional regarding your situation. For legal, accounting or tax advice consult the appropriate professional.

© Corebridge Financial, Inc. All rights reserved.