

Personal Financial Worksheet

Congratulations on taking a big step toward a more secure financial future! **Please complete as much of this worksheet as you can prior to your personal one-on-one meeting** to help make the most effective use of the meeting. You'll have the opportunity to discuss your financial goals and current status in order to create a personalized, action-oriented guide with the help of a financial professional.

Personal Information				
	Name	Date of Birth	Annual Income/Salary	
You	_____	____/____/____	_____	
E-mail address	_____			
Partner	_____	____/____/____	_____	
Children	_____	____/____/____		
	_____	____/____/____		
	_____	____/____/____		
Current Employer-Provided Insurance Benefits				
	Life Insurance	Long-Term Disability Insurance (% or \$)	Short-Term Disability Insurance (% or \$)	
You	_____	_____	_____	
Partner	_____	_____	_____	
Employer-Sponsored Retirement Plan Benefits				
	Retirement Plan Balance	Your Pre-tax Contribution (% or \$)	Your Post-tax Contribution (% or \$)	Employer Retirement Plan Match
You	_____	_____	_____	_____
Partner	_____	_____	_____	_____
Other Retirement and Savings Accounts				
	Previous Employer-Sponsored Retirement Plan(s)	IRA	Other (Mutual Funds, CDs, Savings, College Funding)	
You	_____	_____	_____	
Partner	_____	_____	_____	

Retirement Income Sources (projected income)			
	Social Security	Defined Benefit/Pension	Other
You	_____	_____	_____
Partner	_____	_____	_____

Additional Insurance				
	Face Amount of Personal Life Insurance	Benefit Amount of Personal Disability Insurance	Dental Insurance	Vision Insurance
You	_____	_____	<input type="checkbox"/>	<input type="checkbox"/>
Partner	_____	_____	<input type="checkbox"/>	<input type="checkbox"/>
Children	_____	_____	<input type="checkbox"/>	<input type="checkbox"/>

Budget/Household Spending		
	Monthly Expenses	Balance
Mortgage/Rent	_____	_____
Transportation (car loans, gas, insurance)	_____	_____
Credit Card(s)	_____	_____
Student Loan(s)	_____	_____
Home Equity Loan/Line of Credit	_____	_____
Utilities	_____	_____
Child Care	_____	_____
Other (food, entertainment)	_____	_____
TOTAL	_____	_____

NOTES
Write some notes about your financial priorities, questions and concerns you would like to discuss.



WE'LL GIVE YOU AN EDGE®

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