

# A Quick Look



CONFIDENTIAL



Today's Date    \_\_\_ / \_\_\_ / \_\_\_

General Information			
Name and Age		Phone	E-mail
1		-    -	
2		-    -	
Address, City, State, Zip Code			Resident Since (Year)
Employment Information			
Occupation	Employer, Since (Year)	Annual Salary	Other Income
1		\$	\$
2		\$	\$
Assets Information			
Estimated Value			
Typical Checking Account Balance:		Typical Savings Account Balance:	
House, Cars, & Other Assets			
\$		\$	
\$		\$	
\$		\$	
Investments, Retirement Accounts, Pension			
		Estimated Value	Annual Contribution
		Estimated Value	Annual Contribution
		Estimated Value	Annual Contribution
		Estimated Value	Annual Contribution
		Estimated Value	Annual Contribution
Mortgage, Loans, & Other Debts			
\$		\$	
\$		\$	
\$		\$	
Food For Thought			
What do you like best now about your financial life?			
What would you most like changed about your financial life?			
Who in your life is counting on your financial independence, either today or in the future?			
Is there anything important in your life that we haven't asked about?			