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| --- | --- | --- | --- | --- |
| Confidential Client Profile  Complete and Return to Your Referring Agent or Advisor | | | | |
| **DATE Submitted:** | | | | |
| Name: | | Spouse: | | |
| Date of Birth: | | Date of Birth: | | |
| Best Contact Telephone #: | | Best Contact Telephone #: | | |
| Email Address: | | Email Address: | | |
| Home Address: | City: | | State: | Zip: |
| Own or Rent: |

INCOME INFORMATION:

|  |  |
| --- | --- |
| *Gross Income (Yearly):\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_* | *Spouse Gross Income (Yearly):\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_* |
| **Net Income Per Pay Check:** | **Net Income Per Pay Check:** |
| **How often do you get paid?** | **How often do you get paid?** |
| **Next pay date:** | **Next pay date:** |
| Other Income (Who, how often, when?): | Other Income (Who, how often, when?): |

Employment Information

Employer: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Employer (Spouse): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Position: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Position: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Phone #: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Phone #: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

How long employed: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ How long employed: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Are you a business owner?** If so, what is the name of your business? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Expected Yearly Retirement Income:

Retirement age: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Retirement age: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Social Security Income: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Social Security Income: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Pension Income: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Pension Income: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Income Required for a Comfortable Retirement: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

CURRENT MORTGAGE INFORMATION: **(Primary Home)**

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| --- | --- | --- | --- |
| Name of Lender: | | Type Loan: | |
| Home Value: | | Purchase Price: | |
| Current Term: | | Start Date (Month/Year): | |
| Current Mortgage Initial Loan Amount: | | Current Balance: | |
| Interest Rate: | | Fixed or Variable: | |
| **Total Monthly Mortgage Payment** (including escrows): | | Date mortgage is **paid**: | |
| ***Use this section for Home Equity Lines or Fixed 2nd Mortgages – Note: For HELOC, include Line Amount*** | | | |
| 2nd Mortgage Lender: | | Fixed or Variable: | |
| Original Term: | | Starting Date (Month/Year): | |
| Original Balance/Line Amount: | | Current Balance: | |
| Interest Rate: | Payment: | | Date paid: |

LIABILITIES: (Credit Cards, Auto, Education, Boat and Home Equity Loans, etc.)

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| *TYPE OF ACCT.* | *COMPANY* | *START DATE*  *(Month/Year)* | *STARTING BAL.* | *CURRENT BAL.* | *MIN. PAYMENT* | *INTEREST RATE* | *TERM* | *DATE PAID* |
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NON-QUALIFIED ASSETS: (Savings, Checking, Money Market, CDs, Bonds, Stocks & Mutual Funds)

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Type | Company | Current Balance | Annual Contribution | Rate of Return | Owner |
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QUALIFIED ASSETS: (IRAs, Roth IRA, 401K, 403B, TSP etc.)

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| --- | --- | --- | --- | --- | --- |
| Type | Company | Current Balance | Annual Contribution | Rate of Return | Owner |
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LIFE INSURANCE:

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Type | Company | Current Balance | Annual Contribution | Rate of Return | Owner |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |