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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:

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