



Date: _____

Where Have You Seen Us? (Check all that apply.)

- £ About.com
- £ Atlanta Journal Constitution (AJC)
- £ Facebook/Twitter/LinkedIn
- £ Fidelity
- £ Google Ad / Search
- £ Local Event: _____
- £ "Money Matters" Radio Show
- £ Referral by: _____
- £ Schwab
- £ "You Can Retire Sooner Than You Think" by Wes Moss

Client Information

| | |
|---|--|
| <p>Client A</p> <p>Name: _____</p> <p>Home Address: _____</p> <p>_____</p> <p>Home Phone: _____</p> <p>Work Phone: _____</p> <p>Cell Phone: _____</p> | <p>Preferred Email: _____</p> <p>Occupation: _____</p> <p>Employer: _____</p> <p>Birthday: _____</p> <p>Desired Retirement Age: _____</p> <p>Emergency Contact Name: _____</p> <p>Emergency Contact Phone: _____</p> |
|---|--|

| | |
|--|---|
| <p>Client B</p> <p>Name: _____</p> <p>Work Phone: _____</p> <p>Cell Phone: _____</p> <p>Preferred Email: _____</p> | <p>Occupation: _____</p> <p>Employer: _____</p> <p>Birthday: _____</p> <p>Desired Retirement Age: _____</p> |
|--|---|

| | |
|-----------|------|
| Children: | Age: |
| | |
| | |
| | |
| | |

Income

| | Client A | Client B | Totals |
|-----------------|----------|----------|--------|
| Salary | | | |
| Pension | | | |
| Social Security | | | |
| Other | | | |
| Total Income: | | | |

Retirement Income

Estimated monthly needs:

Monthly retirement income:

Shortfall/Surplus:



Goals and Objectives

Real Estate

Primary Residence:

Other:

Debt

Credit Card:

Auto:

Home Equity:

Other:

Estate Plans

Wills:

Trusts:

Power of Attorney:



Insurance (Life, Disability, LTC)

Policy Holder Type Amount Notes

Investments (401K, Roth, IRA, Brokerage, Trust)

| Account Holder | Type | Amount | Notes |
|----------------|------|--------|-------|
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