



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>
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<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>
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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