

Personal Profile Worksheet

PKIMAKY			SPOUSE					
Name:	DOB: _	//	Name:		DOB:	//		
Phone #:	Email:_		Phone #:		Email:			
Employer / Job	Title:		Employer / Job Title:					
Salary:			_ Salary:					
Veteran?: □ Yes	s □ No Branch:		Veteran?: _	Veteran?: □ Yes □ No Branch:				
Home Address:	:		_ DEPEND	ENTS				
City:	State:	Zip:	Name:	Age:	Name:	Age:		
			Name:	Age:	Name:	Age:		
BANK BAI	LANCES/ LIQUII) ASSETS	F	REAL ESTA	ATE ASSETS			
Di ii vik Di ii	Institution				Value			
Cash:			F	Primary Resid	lence:			
Checking:			2	2 nd Home:				
Savings:			I	nvestment Pr	operty:			
Money Market	:t:		C	Other:				
•								
INVESTME	NTS (IRA, 401(k)	, 403(b), other)					
Owner	Туре	Value	Not	es/Misc.				
	-							
								

Personal Profile Worksheet

Mortgage Home Equity Credit Card Auto Loan Other MISCELLANEOUS What specific questions would you like to address during your initial discussion? What financial planning topics do you wish to address (check all that apply)? () Cash Flow () Tax Planning () Investment Mgmt. () Estate Preservation () Retirement Planning () Life Insurance Needs () Home Purchase () College Savings ()	Home Equity Credit Card Auto Loan Other MISCELLANEOUS What specific questions would you like to address during your initial discussion? What financial planning topics do you wish to address (check all that apply)? () Cash Flow () Tax Planning () Investment Mgmt. () Estate Preserved () Retirement Planning () Life Insurance Needs () Home Purchase () College Saving () ()	Payme
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Are there any family circumstances that may impact your Plan? What life changes (if any) prompts you to seek financial advice? What age do you expect / want to retire? Primary: Spouse: Do you expect to work part time in Retirement? () YES () NO Please rate your knowledge: Mutual Funds () None () Moderate () Very Stocks () None () Moderate () Very ETFs () None () Moderate () Very	Are there any family circumstances that may impact your Plan? What life changes (if any) prompts you to seek financial advice? What age do you expect / want to retire? Primary: Spouse: Do you expect to work part time in Retirement? () YES () NO Please rate your knowledge: Mutual Funds () None () Moderate () Very	ation
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