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Financial Blueprint

We know this form doesn't tell your full story, but it'll help us get to know you better

- It's okay if you don't know exact dollars and cents and have to estimate or leave somethings blank.
- If you have any questions, please feel free to contact our office. We're friendly, I promise.
- Don't worry, your information is safe with us. We won't disclose anything to anyone without your expressed written consent.
- We'd love to have this completed blueprint and your most recent statements prior to your appointment so we can make the most of our time together.

Who You Are

Yourself:

Full Legal Name
Nickname
Job Title
Employer
Home Address
Home Phone
Cell Phone
Work Phone
Email Address
Date of Birth
SSN
DL
Referred By
Perferred Contact Method

Spouse:

Full Legal Name
Nickname
Job Title
Employer
Home Address
Home Phone
Cell Phone
Work Phone
Email Address
Date of Birth
SSN
DL
Anniversary Date
Perferred Contact Method

Children

Name	Date of Birth	Social Security No.	State of Residence	Dependent
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What You Own

Please provide your most recent statements/reports.

Cash	Stock (not included in retirement plans)
Checking Account	Common Stock
Savings Account	Restricted Stock
CD's	Mutual Funds
Bank Money Market	Vested Stock Options
Other Money Market	Real Estate
	Residence
	Rental Property
	Limited Partnerships/Business Interest

This box is reserved for additional comments:

Retirement Plans

Type	Owner	Value
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What You Owe

Type	Interest Rate	Payment	Current Balance
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What's Coming In and Going Out

Estimated Annual Expenses

This box is reserved for additional comments:

Life Insurance

Insured Persons	Company	Type	Year Issued	Death Benefit	Premium	Cash Value
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Do you have disability insurance?

Do you have long term care insurance?

Do you have any existing health problems?

The Rest of Your Team

Professional	Name	Contact Number	Years Worked
CPA/Tax Preparer			
Estate Attorney			

Other Life Questions

Do you have a current will?

Do you have a current living trust?

Do you expect any significant changes within the next 5 years?

If so, tell us about it in the box below.

This box is reserved for additional comments to help us get to know you better: