

# INITIAL FACT FINDER

## Spouse 1

First Name

Last Name

Birthdate

## Spouse 2

First Name

Last Name

Birthdate

## INCOME

Spouse 1

Spouse 2

Salary, if applicable:

Social Security, current or Full Retirement Age estimate ([www.ssa.gov](http://www.ssa.gov)):

Pension, including start age:

Other income sources, if applicable:

Projected retirement age:

Desired funds for short-term objectives:

Desired percentage protected/guaranteed:

Desired annual income at retirement:

## EXPENSES

Current total monthly or annual expenses (please specify):

Rent/Mortgage:

Taxes:

Utilities:

Insurance:

Debt Repayment:

Charitable Donations:

Transportation:

Travel:

Food:

Hobbies:

Healthcare:

Gifts:

## NET WORTH

Spouse 1

Spouse 2

Cash net worth balances (savings, checking, money market, CDs):

Include statements for IRA or Roth accounts

Life insurance face amounts:

Include statements for any non-term policies

Investment accounts: Include statements for brokerage, annuities, mutual funds, stocks, etc.

401(k): Include both current allocation and all available investment options

Additional net worth: Include real estate (excluding primary residence), farmland, businesses, etc.

Disclosure: