

Household Name \_\_\_\_\_

**Personal Information**

Primary Contact				Spouse/Other: _____			
Dr.	Miss	Mr.	Mrs.	Ms.	Rev.	Other: _____	
_____				_____			
First Name _____ MI _____				First Name _____ MI _____			
_____				_____			
Last Name _____				Last Name _____			
_____				_____			
Date of Birth _____				Desired Retirement Age _____			
_____				_____			
Cell Phone _____				Work Phone _____			
_____				_____			
Email Address _____				Email Address _____			
Divorced      Married      Single      Widowed				Divorced      Married      Single      Widowed			
_____				_____			
Home Address _____				Home Phone _____			
_____				_____			
City _____ ST _____				Zip/Postal Code _____ Home Fax _____			

**Employment Information**

Primary Contact			Spouse/Other		
Currently employed full-time	Currently employed part-time		Currently employed full-time	Currently employed part-time	
Currently unemployed	Self-employed	Retired	Currently Unemployed	Self-employed	Retired
_____			_____		
Occupation _____ # of Years _____			Occupation _____ # of Years _____		

**Household Assets**

	Account Description	Custodian/Institution	Balance
<b>1</b>	_____	_____	\$ _____
<b>2</b>	_____	_____	\$ _____
<b>3</b>	_____	_____	\$ _____
<b>4</b>	_____	_____	\$ _____
<b>5</b>	_____	_____	\$ _____
<b>6</b>	_____	_____	\$ _____

**Household Liabilities**

	Account Description	Creditor/Institution	Balance
<b>1</b>	_____	_____	\$ _____
<b>2</b>	_____	_____	\$ _____
<b>3</b>	_____	_____	\$ _____
<b>4</b>	_____	_____	\$ _____
<b>5</b>	_____	_____	\$ _____

**Household Income**

	Description/Source	Annual Amount
<b>1</b>	_____	\$ _____
<b>2</b>	_____	\$ _____
<b>3</b>	_____	\$ _____
<b>4</b>	_____	\$ _____

**Household Goals**

	Description	Date of Accomplishment	Amount
<b>1</b>	_____	_____	\$ _____
<b>2</b>	_____	_____	\$ _____
<b>3</b>	_____	_____	\$ _____

**Household Dependents**

	Name	Age	Relation to Primary Contact
<b>1</b>	_____	_____	_____
<b>2</b>	_____	_____	_____
<b>3</b>	_____	_____	_____
<b>4</b>	_____	_____	_____

**Household Concerns**

How concerned are you about...	Low	Moderate	High
1. Having your investment portfolio keep pace with inflation?.....			
2. Obtaining all suitable tax benefits for which you are legally entitled?.....			
3. Feeling certain that you do not lose any of your original investment?.....			
4. Being able to quickly convert your investments to cash at reasonable market values?.....			
5. Withdrawing maximum income from your investment portfolio this year?.....			
6. Having an investment plan that is easy for your heirs to manage in the event of your death?.....			
7. Saving/investing for education?.....			

**I/We need a total annual income stream of \$ \_\_\_\_\_ (in today's dollars) in order to maintain a comfortable lifestyle during retirement.**