



WEALTH MANAGEMENT[®], INC.

Financial Planning Worksheet

www.RetireRelax.com

FINANCIAL PLANNING WORKSHEET

Name: _____ DOB: _____
 e-mail: _____ Phone: _____
 Name: _____ DOB: _____
 e-mail: _____ Phone: _____

A - Financial Assets

Account Types Include: Checking and Savings Accounts, CD's, Money Markets,
 401(k)/403(b), Mutual Fund Accounts, Investment Accounts

ACCOUNT TYPE	WHERE ACCOUNT IS HELD	APPROXIMATE BALANCE
		\$
		\$
		\$
		\$
		\$
		\$
		\$
		\$
ASSETS TOTAL		\$

B - Sources of Income

Sources of Income Include: Wages and Commission, Social Security, Disability,
 Rents, Investment income, Dividends, and etc...

SOURCE	WHERE ACCOUNT IS HELD	APPROXIMATE BALANCE
		\$
		\$
		\$
		\$
		\$
		\$
TOTAL ANNUAL INCOME		\$
TOTAL MONTHLY INCOME		\$

C. Expenses/dEBT

Expenses Include: Mortgages, Rents, Child Care, Transportation, Home Owner Association Fees, Food, Travel & Leisure, Medical, Student Loans, Personal Loans, Utilities, Insurance and Credit Card Payments.

Expense	Balance	Monthly Cost	Pay Off Date
	\$	\$	
	\$	\$	
	\$	\$	
	\$	\$	
	\$	\$	
	\$	\$	
	\$	\$	
	\$	\$	
	\$	\$	
	\$	\$	
	\$	\$	
	\$	\$	
	\$	\$	
TOTAL EXPENSES	\$	\$	

D. Totals

SECTIONS TOTAL				
A	+	B	=	\$
AB	-	C	=	\$
ABC	=	Net	\$	

NOTES:

Additional Questions

At what age do you/spouse plan to retire?	
How Much monthly income will you need in retirement?	\$
Do you have Life Insurance?	
Do you have disability or long-term care insurance?	
What are the three primary questions you want answered in this session?	
1.	
2.	
3.	

Other Questions

1.
2.
3.
4.
5.
5.
7.
8.
9.
10.

We offer complementary consultations to help you through any financial decisions, including retirement planning.

Additional Special reports on Our Website:

[About Us](#)

[What to Expect During Your Complementary Consultation](#)

[My Life Book](#)

[Can I Afford to Retire?](#)

[What do I Need to do to Plan for My Secure Retirement?](#)

[How to Maximize Social Security Benefits?](#)

[Your Guide to Saving for Retirement with an IRA](#)

[Your Stock Market Survival Guide](#)

[Who Really Gets My Money When I Die?](#)

[What to do When Your Spouse Dies](#)

[For the Instantly Wealthy](#)

[Financial Planning Worksheet](#)

[Your Money and Your Memory](#)

[A Guide to Caregiver Self-Care](#)

[Internet Scams and Identity Theft](#)

[Federal Trade Commission Identity Theft Report](#)

Joins us Saturdays each Saturday morning from 9-10a, on AM 940 WMAC where we produce “YOUR MONEY” where we discuss various topics that could affect “Your Money.”

We are available to speak to your group at no charge on a number of financial topics. If You need a guest speaker, call our office and let us know how we can be a resource for you.

In our culture, the only thing we avoid talking about more than death, is money. That is why Sherri Goss, CFP® created My Life Book, and it is free on our website. Print the pages, place them in a binder, and work through the process of documenting where things are, and how you want thing to go in the event even of your death or incapacity. Your family will greatly appreciate that you’ve planned ahead. So, please, check out My Life Book today

Securities and investment advisory services offered through **Osaic Wealth, Inc.** member FINRA/SIPC. **Osaic Wealth** is separately owned and other entities and/or marketing names, products or services referenced here are independent of **Osaic Wealth**.



Lifespan

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