Kremer&Associates, Inc.
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CONFIDENTIAL WEALTH PLAN WORKSHEET

PERSONAL INFORMATION

	Client 1	*Client 2*
Legal Name		
Preferred Name		
Date of Birth		
Social Security Number		
Driver's License Number		
	Issue Date ____ Exp Date ____	Issue Date ____ Exp Date ____
Primary Phone		
Email Address		
Residential Address		
City, State, Zip		

EMPLOYMENT INFORMATION

Occupation and Title		
Employer		
Employer Address		
City, State, Zip		

PERSONAL INCOME STATEMENT

Earned Income	$	$
Pension	$	$
Social Security	$	$
Other Income	$	$

PERSONAL BALANCE SHEET

	Non-Retirement Assets	
Stocks/Bonds/Mutual Funds	$	$
Checking/Savings	$	$
Other	$	$
	Retirement Assets	
IRAs, Roth IRAs	$	$
401(k), 403(b), 457, etc.	$	$
Other (Deferred Comp, Annuities)	$	$
	Liabilities	
Mortgage (term/rate/yr acquired)	$	$
Auto Loans, Student Loans, etc.	$	$
Credit Cards & short-term debt	$	$
Other	$	$