Financial Overview Form

Client Name(s): ______________________________________ Appointment Date: ____________

Pension Lump Sum Amount	$	____________
Retirement Accounts (IRA, 401k, 403b, etc.)	$	____________
Non-Retirement Accounts (Stocks, Bonds, Mutual Funds & Annuities)	$	____________
Checking, Savings, Cash, & Money Market	$	____________
Other (Inheritance, Businesses Owned, Rental Properties, etc.)	$	____________
Total Assets	**$**	____________

Primary Residence Mortgage	$	____________
Other Debts (Car Loans, Credit Card, Student Loans, etc.)	$	____________
Total Debts	**$**	____________

Please answer the following questions to the best of your ability:

1. What do you like most about what you are doing financially?

2. What is your biggest financial worry?

3. What do you hope to discuss during your meeting?

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