



Financial Inventory:

Monthly Income	's Income:		
	's Income:		
	Other Income:		
	Other Income:		
TOTAL INCOME:			

Estimated Monthly Expenses	Mortgage Payment:		
	All Other Estimated Living Expenses:		
	TOTAL EXPENSES:		

Systematic Savings	's 401k Savings:		
	's 401k Savings:		
	's Company Match:		
	's Company Match:		
	Other:		
	Other:		
TOTAL SAVINGS:			

Additional monthly amount you would like to allocate towards goals:	
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Assets	Cash:		
	House:		
	Accounts with CWM:		
	Other:		
	Other:		
	Other:		
	Other:		
TOTAL ASSETS:			

*please provide vesting schedule for equity compensation

Liabilities	Mortgage:		
	Principal & Interest Payment:		
	Impound Payment:		
	Interest Rate:		
	When will mortgage be paid off:		
	Equity Line:		
	Principal & Interest Payment:		
	Interest Rate:		
	Other: (i.e. Car Loan/Lease Payment, Student Loans, Credit Card)		
	Other: (i.e. Car Loan/Lease Payment, Student Loans, Credit Card)		
TOTAL LIABILITIES:			



Protection:

Life Insurance	Life Insurance:		
	Life Insurance:		
	Other:		
	Other:		
Disability Insurance	Disability Insurance:		
	Disability Insurance:		
	Other:		
	Other:		
Term Care Insurance	Daily Benefit for Long Term Care:		
	Daily Benefit for Long Term Care:		
	Other:		
	Other:		
Property & Casualty	Umbrella Policy:		

Income in Retirement (if applicable):

Types of Income	's Pension:		
	's Pension:		
	's Social Security at 67:		
	's Social Security at 67:		
	Rental:		
	Other:		
	Other:		

Estate Planning:

Documents Completed	Living Trust:		
	Will:		
	Durable Power of Attorney:		
	Health Care Directive:		

Important Contacts:

Name(s) & Contact Information

Satisfaction Level

- CPA
- Estate Attorney
- Mortgage Broker
- Real Estate Agent
- Power of Attorney

Questions you would like to address: