**Family Information**

**Spouse 1 – MM/DD/YYYY (Age \_\_)  
Email**:  
**Phone**:  
**Location**: **Job**:

**Spouse 2 – MM/DD/YYYY (Age \_\_)  
Email**:  
**Phone**: **Job**:

**Other Family Members (Relationship) – MM/DD/YYYY (Age \_\_)**

**Qualitative Data and Planning Objectives**

**Income = $\_\_\_\_\_\_**

Pay statement and employee benefits information

**Social Security**

**Spouse 1’s Social Security Benefits**  
**Earnings Since**:   
**Years of Earnings**:  
**Expected Future Earnings**:

**Spouse 1’s Social Security Benefits**  
**Earnings Since**:   
**Years of Earnings**:  
**Expected Future Earnings**:

**Expenses = $**

**Real Estate = $\_\_\_\_\_\_**

**Primary Residence = $\_\_\_\_\_\_**  
**Address**:  
**Homesite Value**:  
**Land Value**:  
**Property Tax**:  
**Titling**:

**Debts = -$\_\_\_\_\_\_**

**Primary Mortgage (\*\*\*\*) = -$\_\_\_\_\_\_**  
**PI Payment**:  
**TI Payment**:  
**Monthly Payment**:  
**Annual Payment**:  
**APR**:  
**Years Remaining**:

**Investments = $\_\_\_\_\_\_ (\_\_% Pre-Tax, \_\_% Taxable, \_\_% Roth)**

**Account Name (\*\*\*\*) = $\_\_\_\_\_\_  
Asset Allocation**:  
**Holdings**:  
**Details**:

**Insurance**

**Taxes**

**Estate Planning**