**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**