

FINANCIAL & TAX WORKSHEET

Planner: _____

PERSONAL INFORMATION

Husband's Legal Name: _____

Name Husband Usually Uses to sign legal documents: _____

Wife's Legal Name: _____

Name Wife Usually Uses to sign legal documents: _____

Home Telephone: _____ County of Residence: _____

Address: _____ City: _____ State _____ Zip: _____

Husband		Wife	
Date of Birth		Date of Birth	
Social Security Number		Social Security Number	
Driver's License No.		Driver's License No.	
US Citizen?	Yes or No	US Citizen?	Yes or No
E-mail		E-mail	

Married: Date of Marriage _____ Divorced Widowed Single

CHILDREN

Use full legal names, complete addresses and dates of birth. (Use "JT" if both spouses are the parents, "H" if husband is the parent and "W" if the wife is the parent.)

Child's Full Legal Name	Address	Telephone Number	Date of Birth	JT/H/W

Assets

Checking and Savings Accounts

<i>Description</i>	<i>Current Value</i>	<i>Specifics</i>
1. _____	\$ _____	_____
2. _____	\$ _____	_____
3. _____	\$ _____	_____
4. _____	\$ _____	_____
5. _____	\$ _____	_____
Total	\$ _____	

CD's and Money Market Accounts

<i>Description</i>	<i>Current Value</i>	<i>Specifics</i>
1. _____	\$ _____	_____
2. _____	\$ _____	_____
3. _____	\$ _____	_____
4. _____	\$ _____	_____
5. _____	\$ _____	_____
Total	\$ _____	

Stocks, Bonds and Mutual Funds

<i>Description</i>	<i>Current Value</i>	<i>Specific Holdings</i>
1. _____	\$ _____	_____
2. _____	\$ _____	_____
3. _____	\$ _____	_____
4. _____	\$ _____	_____
5. _____	\$ _____	_____
Total	\$ _____	

Retirement Accounts

IRA, 401-K, TSA or other Accounts

<i>Description</i>	<i>Current Value</i>	<i>Specific Holdings</i>
1. _____	\$ _____	_____
2. _____	\$ _____	_____
3. _____	\$ _____	_____
4. _____	\$ _____	_____
5. _____	\$ _____	_____

Life Insurance/Annuities

<i>Description</i>	<i>Current Value</i>	<i>Specific Holdings</i>
1. _____	\$ _____	_____
2. _____	\$ _____	_____
3. _____	\$ _____	_____
4. _____	\$ _____	_____
5. _____	\$ _____	_____

Income Sources:

- 1. **Social Security:** _____
- 2. **Pensions:** _____
- 3. **Investments:** _____
- 4. **Rents:** _____
- 5. **Other:** _____

Tax Notes:

- 1. **AGI:** _____
- 2. **C.G.'s:** _____
- 3. **Deductions:** _____
- 4. **Credits:** _____
- 5. **Other:** _____

Additional Information:
