

THE WORRYFREE RETIREMENT[®]



DOCUMENTS NEEDED FOR APPOINTMENT

- | | |
|---|--|
| <input type="checkbox"/> Social Security Estimate Statement | <input type="checkbox"/> Annuity Contracts |
| <input type="checkbox"/> Current Insurance Policies (life, long-term care) | <input type="checkbox"/> Most Recent Tax Return |
| <input type="checkbox"/> Investment Statements (brokerage, IRA, 401(k), Roth) | <input type="checkbox"/> Most Recent Paycheck Stub |
| <input type="checkbox"/> Bank Statements (CDs, Money Market, Savings) | <input type="checkbox"/> Pension Statement/Information |
| Other _____ | Other _____ |

FINANCIAL INFORMATION

Total Assets	Current Value	Amount of Debt	Monthly Payment	Interest Rate
Residence	_____	_____	_____	_____
Other Real Estate	_____	_____	_____	_____
Retirement Accounts:				
 Yourself	_____	_____	_____	_____
 Spouse	_____	_____	_____	_____
Stock Brokerage Accounts (non IRA)	_____	_____	_____	_____
 Checking	_____	_____	_____	_____
 Savings/Money Markets	_____	_____	_____	_____
 CDs	_____	_____	_____	_____
Life Insurance Cash Value:				
 Yourself	_____	_____	_____	_____
 Spouse	_____	_____	_____	_____
Life Insurance Death Benefit:				
 Yourself	_____	_____	_____	_____
 Spouse	_____	_____	_____	_____
Annuities (non IRA or retirement accts)	_____	_____	_____	_____
Other	_____	_____	_____	_____
Other	_____	_____	_____	_____



FINANCIAL INFORMATION (cont.)

Total Liabilities	Current Value	Amount of Debt	Monthly Payment	Interest Rate
Vehicles				
Credit Cards				
Home Equity Line of Credit				
Student Loan				
Student Loan				

NOTES

