

Financial Solutions - John W. Fiege, CFP®

Objective Advice to Help You Reach Your Goals and Find Peace of Mind

**Confidential
Personal
Financial Profile**

Date Completed: _____

	Name	Age	Life Expectancy	Date of Birth	Social Security #
Client 1				/ /	- -
Client 2				/ /	- -
Children & Dependents				/ /	- -
				/ /	- -
				/ /	- -

Home Address

Primary Email

Home Phone () -

Home Fax # () -

Line 2 # () -

	Client 1	Client 2
OCCUPATION	# Years at Job:	# Years at Job:
Business Name		
Business Address		
Business Phone	() -	() -
DL #, Exp, State		
Cell Number	() -	() -
Email		
Target Age to Retire	1st Choice: 2nd Choice:	1st Choice: 2nd Choice:

Miscellaneous Information:

Marriage Date / /

Referral Source

of Years in Current Home

Any Non-US Citizen in household?
 Yes No

	Name	Phone #
Insurance Agent		
Stockbroker		
CPA		
Attorney		
Other Advisor		

Please list addresses on back if not local.

CURRENT ANNUAL INCOME -Attach recent PAY STUBS if possible

	Client 1	Increase rate/yr	Client 2	Increase rate/yr
Salary (Gross)				
Bonus				
Net Business Income (Loss)				
Dividends / Interest				
Social Security				
Net Rental Prop. Income (Loss)				
Gifts				
Retirement Income*				
Other				
Total Gross Income				

*If pension income please describe any survivorship options below.

RESIDENCE - Complete Lines 3-8 Only If Planning to Sell

ASSET	Res.#1	Res.#2
Current Residence Market Value		
Original Cost+ I m provements		
Client Age at Sale		
Sales Costs (% of sale price)		
Cost of Replacement Home		
New Mortgage (% of replacement home price)		
Interest Rate on New Mort. Loan		
Number of Years for New Loan		

EMPLOYEE BENEFITS

Please enter group insurance policies on page 3 and note that they are group plans.

Bring list and costs of all benefits your employer provides, whether you use them currently or not.

Enter retirement plans on page 4 and bring full information package with you.

Bring any statements/pension plans/ other benefits from previous employers as well.