



Confidential Discovery



First Name	Last Name	Date
First Name	Last Name	

About You	Household	Goals Resid	dence Inc	come Taxes	Financial Snap	shot Budge	t Recap
First Name		Last Name		Date of Birth		Primary Reside	nce State
Email				Phone Number	er	Gender	
Employment St	tatus						
Full-Time	e OHomema	ker OPart-Tim	ne ORetir	ed OSelf-Empl	oyed OStuder	nt OUnemplo	oyed
Marital Status							
Single	OPartner ()Domestic Partn	er ODivo	rced Separa	ted \(\) Widow	ed	
About You	Household	Goals Resid	lence Inc	ome Taxes	Financial Snaps	shot Budget	Recap
What is most i	mportant to yo	u?					
First Name (Spo	ouse/Partner)	Last Name		Relationship	Date o	of Birth G	
Employment St	tatus						
○ Full-Time	e OHomema	ker OPart-Tim	ne	ed OSelf-Empl	oyed OStuder	nt OUnemplo	oyed
First Name (Dep	pendents)	Last Name		Relationship	Date o	of Birth G	iender
Notes							

About You	Household	Goals	Residence	Income	Taxes	Financial	Snapshot	Budget	Recap
Protection			Accumul	ation		F	Preservation	1	
Emergency Sav	vings		Retireme	ent		li	ncome Strat	tegies	
Emergency	Fund		Save	for Retirem	ent Needs	5	Retireme	ent Income	Strategies
Debt Reduction	n		Educatio	n Funding		C	Charitable G	iving	
Business Lo	oan		Save	for Education	n Expens	es [Fund Cha	aritable Givi	ng
Car / Vehic	le Loan		Lifestyle	Purchase		E	state Plann	ing	
Credit Card	l Debt		Boat				Leave a L	egacy	
Home Equi	ty Loan		Car/	Vehicle					
Medical De	ebt		Hom	e Renovatio	n				
Mortgage L	oan		Majo	r Event					
Student Lo	ans		Real	Estate					
Other Debt	:		Trave	el / Vacation					
Get Covered			Wed	ding					
Health Insu	irance		Othe	r Lifestyle Pı	urchase				
Property &	Casualty Insura	ance							
Disability Ir	ncome Insuranc	е							
Long-Term	Care Insurance								
Life Insurar	nce								
About Vou	Household	Goals	Residence	Incomo	Tayos	Financial	Snanshat	Dudget	Docon
About You				Income	Taxes	Financial		Budget	Recap
Own Address	Rent	Property v	'alue (If own)	Add	ress 2 (Op	Monthly rent	t amount (ii	rent)	
					· 000 = (0)	,			
City			State	Zip					
Mortgage Balar	nce Years	s Remainin	g Mor	nthly Payme	nt I	nterest Rate	2	Company /	Servicer
Home Equity Lo	oan Bal. Years	s Remainin	g Mor	nthly Payme	l nt l	nterest Rate	<u> </u>	Company /	' Servicer
				. ,					
Do you expect	any changes in	your housi	ng situation in	the next 3-5	5 years?	○No (Yes		

About You Household Residence Financial Snapshot Goals **Income** Taxes Budget Recap If you were financially set, what would you want your life to look like? Job Holder Job / Income Type () I work for someone else () I work for myself () This is a non-work income Employer / Source Industry (Optional) Role Annual Pre-tax Income Annual Pre-tax Bonus Job / Income Type Job Holder I work for someone else I work for myself This is a non-work income Annual Pre-tax Income Annual Pre-tax Bonus Employer / Source Industry (Optional) Role Job Holder Job / Income Type I work for someone else I work for myself This is a non-work income Annual Pre-tax Income Annual Pre-tax Bonus Employer / Source Industry (Optional) Role Do you expect any significant compensation change? () No () Yes About You Household Financial Snapshot Goals Residence Income **Taxes** Budget Recap Married filing jointly Filing Status: () Single () Married filing separately ○ No Is Client 1 a US Citizen? ()Yes Is Client 2 a US Citizen? ()Yes () No Your Federal and State tax rates will be calculated from the income information you have provided. Enter your **Local** Tax Rate if you have one If you know your total effective tax rate you may enter it here **Notes**

Assets							
Asset Name	Asset Type	Financial Institution	Curre Balan		t Savings Amount	Savings Frequenc	
						•	
Liabilities							
Liability	Liability	Compai	ny /	Current	: Interest	Monthly	Years Owner
Name	Туре	Service	er	Balance	Rate	Payment	
							+
							+
							+1000
							11000
							+
Future Income							
Future Income Name	Income Source		ncome tart Age	Income Frequency	Inco Amo		Payout Owner uration C1 C2 Jr
							-1000
							-1000

	Household	Goals	Residenc	ce In	come	e Tax	xes	Fina	ncial S	napshot	Budget	Recap
Protection -	Disability In	s.										
Policy Nickname		Car	rier	Mon Ben	-	Emplo Offer	•	Elimin Peri		Benefit Period	Monthly Premium	Insure C1 C
_]					
							<u> </u>					
Protection -	Long-Term (Care Ins.										
Policy			Daily E	mploye		etime enefit		ne Car Daily	e Elim.	Benefit	Monthly	Insure
Nickname	Car	rier	Benefit	Offered	Ma	ximum	Ma	ximum	Perio	d Period	Premium	-
				$\frac{\square}{\square}$								
									<u> </u>			
Protection -	Life Ins.											
Policy	Policy			eath	Empl		Cash		Pay For		m Premium	
Nickname	Sub-typ	e Carı	rier Be	nefit	Offe	rea 7	Value	= 	Period	Amour	nt Mode	$\bigcap_{i=1}^{C1} \bigcap_{j=1}^{C}$
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	Household	Goals			ncome			FIIId		napshot	Budget	Recap
Vhat would be	e a meaningfu	ıl amount	that you wo	uld be				FIIId		·	thly Savings	•
	e a meaningfu	ıl amount	that you wo	uld be				FIIId		·		•
Vhat would be	e a meaningfu o accomplish	ıl amount your long-	that you wo term goals?	uld be	comfo	ortable			Addi	tional Mor	nthly Savings	, ,
Vhat would be etting aside to About You	e a meaningfo o accomplish Household	ul amount your long- Goals	that you wo term goals?	ce Ir	comfo	ortable e Ta:	xes	Fina	Addi	·		•
What would be etting aside to About You sthere someo	e a meaningfo o accomplish Household	ul amount your long- Goals	that you wo term goals?	ce Ir	comfc	ortable e Ta:	xes	Fina	Addi	tional Mor	nthly Savings	, ,
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What would be etting aside to	e a meaningfo o accomplish Household	il amount your long- Goals ink of who	that you wo term goals?	euld be	comfc	ortable e Ta:	xes	Fina	Addi	tional Mor	Budget	, ,