

# Financial Snapshot

Name: \_\_\_\_\_ D.O.B: \_\_\_\_\_

Name: \_\_\_\_\_ D.O.B: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Home Ph: \_\_\_\_\_ Work Ph: \_\_\_\_\_ Mobile Ph: \_\_\_\_\_

Email: \_\_\_\_\_ Email: \_\_\_\_\_

## **Budgeting/Cash Flow**

Do you feel you have a budget that is working? Yes No

Are you behind on any bills? Yes No

Are you currently making enough income to meet your expense? Yes No

Is your income stable each month? Yes No

## **ASSETS** (Please list the value of the following assets, if any)

### **(Non Retirement Assets)**

Cash Account: \$ \_\_\_\_\_ Life Ins. Cash Values \$ \_\_\_\_\_

Stocks: \$ \_\_\_\_\_ Primary Home: \$ \_\_\_\_\_

C.D.'s/Bonds: \$ \_\_\_\_\_ Other Real Estate: \$ \_\_\_\_\_

Mutual Funds: \$ \_\_\_\_\_

### **(Retirement/College Assets)**

401(k) Assets: \$ \_\_\_\_\_ IRA Assets: \$ \_\_\_\_\_ College Assets: \_\_\_\_\_

## **DEBT/LIABILITIES** (Please list the current balances of the following debts, if any)

1<sup>st</sup> Mortgage: \$ \_\_\_\_\_ Dept. Store Cards: \$ \_\_\_\_\_

Other Mortgages: \$ \_\_\_\_\_ Major Credit Cards: \$ \_\_\_\_\_

Car Loans: \$ \_\_\_\_\_ Installment Loans: \$ \_\_\_\_\_

Student Loans : \$ \_\_\_\_\_ Other Loans: \$ \_\_\_\_\_