

Pre-Training Preparation Meeting Questionnaire

FULL LEGAL

NAME: _____ SPOUSE: _____

AGE: _____ AGE: _____

EMAIL: _____ EMAIL: _____

CELL: _____ CELL: _____

INVESTABLE ASSETS: \$ _____

-Includes retirement plans at work, IRAs, bank accounts, CDs, mutual funds, and money markets

AMOUNT SAVED/INVESTED IN LAST 12 MONTHS: \$ _____

-Includes amount contributed to retirement plans (include company match), contributions to IRAs, deposits into bank savings and checking accounts, and taxable investment accounts

AMOUNT OF LIFE INSURANCE: \$ _____ SPOUSE \$ _____

-Include face amount of all term policies, whole life, and group policies at work

TOTAL DEBT OUTSTANDING: \$ _____

-Include mortgages on all properties, recurring credit card debt, student loan debt, and car loans, etc.

CURRENT ANNUAL HOUSEHOLD INCOME OR DESIRED RETIREMENT INCOME: \$ _____

APPROXIMATE VALUE OF REAL ESTATE HOLDINGS: \$ _____

DO YOU OR SPOUSE EXPECT TO RECEIVE A PENSION IN RETIREMENT? YES NO

-If yes, how much do you expect to draw each year? \$ _____

KIDS:

NAME / AGE: _____

NAME / AGE: _____

NAME / AGE: _____

NAME / AGE: _____

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