Itemization of Household Financial Situation

Today's Date:

Name:

1. **Age:**

2. **Spouse Name/Age:**

3. **Children Names and Ages:**

4. **Grandchildren Names and Ages:**

5. **Accountant Name and Contact Information (e-mail & phone):**

6. **Attorney Name and Contact Information (e-mail & phone):**

7. **Occupation, Employer Name and Employer Address:**

8. **Monthly Net Income and Expenses (Monthly Cash flow):**

9. **Special Income and/or Expenses (part time work, vacations, etc.):**

10. **Pension and Social Security Information (please bring statements to meeting):**

11. **Housing Situation (House / Condo / Apartment):**
    a. Associated Monthly Mortgage Amount
    b. Associated Annual Taxes

12. **Other Asset Values (Vacation Property, Boats, RVs, Autos, etc):**

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3053 Miller Road
Ann Arbor, MI 48103
T: (734) 436-8150
F: (734) 273-9045
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Itemization of Household Financial Situation (continued)

13. **Debts / Liabilities and Associated Rates and Terms (Credit Card Balances, Auto Loans, Mortgages, HELOCs, etc):**

14. **Itemization of Checking/Savings/Cash Accounts:**

15. **Itemization of Retirement Portfolios:**

16. **Itemization of Non-Retirement Portfolios:**

17. **Itemization of Household Life Insurance, Long Term Care Insurance and Disability Insurance:**

18. **Estate Planning Documents in Place?:**
    a. Will? ☐
    b. Durable Power of Attorney? ☐
    c. Medical Power of Attorney? ☐
    d. Trust? ☐

19. **Immediate Financial Related Goals / Objectives:**

20. **Long Term Financial Related Goals/Objectives:**

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