Itemization of Household Financial Situation

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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:**

6. **Attorney Name and Contact Information:**

7. **Occupation and Employer:**

8. **Monthly Net Income and Expenses (Monthly Cashflow):**

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)**

Forest Cove
3053 Miller Road
Ann Arbor, MI 48103
T: (734) 436-8150
F: (734) 273-9045
www.YourLegacyOurFocus.com

Itemization of Household Financial Situation (continued)

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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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