

Financial Plan Data Gatherer

Client: _____ & _____

Goals		
<i>Living expense, college, travel, new home, etc.</i>	Current Income & Retirement Age	
	Client 1	Client 2
	Children (Name & DOB)	
Future Income		Assets
<i>Social Security, Pension, Inheritance, sale of home, etc.</i>		
	Liabilities	
Mortgage:	Term/Rate:	
Monthly \$\$:	Payoff Year:	
Investments/Accounts	Additions	Allocation/Risk Objective

Overall Risk Objective				
Conservative	Moderate	Balanced	Growth	Aggressive

