

EARN YOUR KEEP
KEEP WHAT YOU
EARN



THE LION SHARE
— FINANCIAL GROUP —

General Information

Client Name _____
Social Security ____ - ____ - ____ Age ____ DOB ____/____/____
Home Address _____
Home Phone _____ Work Phone _____
Cell Phone _____ Fax _____
E-mail _____
Work Address _____

Spouse Name _____
Social Security ____ - ____ - ____ Age ____ DOB ____/____/____
Work Address _____
Work Phone _____ E-mail _____

Dependents / Children

Name _____ Age ____ DOB ____/____/____
Name _____ Age ____ DOB ____/____/____
Name _____ Age ____ DOB ____/____/____
Name _____ Age ____ DOB ____/____/____

Goals

Rank the goals that are most important in pursuing. (1 being most important)

- ___ Reduce Debt / Pay Off Mortgage
- ___ Increase Cash Flow
- ___ Achieve Financial Independence
- ___ Plan Retirement
- ___ Maximize Tax Advantages
- ___ Explore Investment Options
- ___ Fund College
- ___ Be Prepared For Untimely Death / Disability
- ___ Explore Estate Planning
- ___ Build Savings For Unexpected Expenses
- ___ Buy A New Home / Major Purchase
- ___ Own A Business

If not listed to the left, what other goals do you have that are most important to you? You can list things like personal interests as well.

Employment & Income

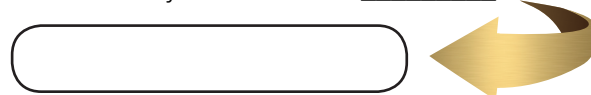
Client Employer _____
Number of Years _____
Client Occupation _____
Spouse Employer _____
Number of Years _____
How many years has it been since you reviewed your family's financial goals? ____ Yrs.
Do you have an established monthly budget? Y / N
How much are you saving monthly? \$_____ Monthly

Current Income	Client	Spouse
Monthly Net Pay		
Bonus, Commission		
Rental Income		
Interest, Dividends		
Alimony/Child Support		
Annuity/Pension Income		
Other Income		
Last Year's Tax Refund		
Total Current Income		
Future Income		
Social Security		
Pension		

Your Expenses

Fixed _____
Mortgage/Rent _____
Property Taxes _____
Utilities _____
Cable/Internet _____
Phone Services _____
Car Payment _____
Insurance _____
 Vehicles _____
 Life/Health _____
Loans/Credit Cards _____
Food _____
Clothing _____
Childcare/Elderly Care _____
Tuition _____
Car _____
 Maintenance _____
 Fuel _____
Entertainment _____
Gifts/Charity _____
Other _____

Total Income _____
Minus Total Expenses _____
Your Monthly Cash Flow _____



Retirement Planning

What is your ideal income on a monthly basis that you would like to have during retirement? \$_____

And how long would you like it to last? _____ Yrs.

Would you like to have inflation considered/calculated for your strategy? Y / N (Circle One) _____%

Would you like to have Social Security considered/calculated for your strategy? Y / N (Circle One)

Investable Assets

Check the assets you have in the check-boxes then list the details in the table below:

Taxable Assets

- ☐ Checking
- ☐ Bank Savings
- ☐ Money Market
- ☐ CDs
- ☐ Mutual Funds
- ☐ Stocks, Bonds, Brokerage

Tax-Deferred Assets

- ☐ Savings Bonds
- ☐ Annuities (Fixed/Variable)
- ☐ 401(k), 403(b), 457 Plans
- ☐ IRA/SEP/Simple
- ☐ Other Qualified Plans

Tax Exempt Assets

- ☐ Roth IRA
- ☐ Cash Value Life Insurance
- ☐ Municipal Bonds / Funds
- ☐ Roth 401(k)

Investment Name	Balance	Monthly Contribution	Employer Match	Return
	\$	\$	\$	%
	\$	\$	\$	%
	\$	\$	\$	%
	\$	\$	\$	%
	\$	\$	\$	%

Loans & Liabilities

Debt Type	Interest Rate	Minimum Payment	Balance
		\$	\$
		\$	\$
		\$	\$
		\$	\$
		\$	\$

Insurance Coverage

Type	Provider	Monthly Premium	Death Benefit	Cash Surrender Value (CSV)
Life [1]		\$	\$	\$
Life [2]		\$	\$	\$

Check One:

- ☐ Group
- ☐ Individual
- ☐ HMO
- ☐ PPO
- ☐ Other

Type	Provider	Monthly Premium	CSV
Health [1]		\$	\$
Health [2]		\$	\$
Disability		\$	\$

Estate Planning

Do you have a Will? Y / N If so, when was the last time you updated your will? ____/____/____

Do you have a Trust? Y / N If so, what kind do you have? _____

Do you anticipate any future inheritance or lump-sums? Y / N Circumstances: _____

Do you own any real-estate free and clear? If so, Asset_____ Market Value \$_____

Do you own any vehicles free and clear? If so, Asset_____ Market Value \$_____

Do you own collectibles, jewelry, antiques? If so, Asset_____ Market Value \$_____