

**PERSONAL INFORMATION WORKSHEET**

*Please Print*

Husband		SSAN:
		Date of Birth:
Wife		SSAN:
		Date of Birth:
Address		
Home Telephone (     )	<input type="checkbox"/> Husband    Work Telephone <input type="checkbox"/> Wife	<input type="checkbox"/> Mobile <input type="checkbox"/> Fax <input type="checkbox"/> Pager (     )
Business Name/Address 1		
Minor Child		SSAN:
		Date of Birth:
Minor Child		SSAN:
		Date of Birth:
Minor Child		SSAN:
		Date of Birth:
Minor Child		SSAN:
		Date of Birth:
E-Mail Address		

## PERSONAL ASSETS AND LIABILITIES WORKSHEET

### Personal Property

	<i>Market Value</i>	<i>Liability</i>	<i>Notes</i>
Home Mortgage			
Rental Property			
Cash/Checking/Savings			
Common Stocks			
Income Mutual Funds			
Growth Mutual Funds			
Limited Partnerships			
Art, Antiques, Stamps, Coins			
Gold, Silver and Options			
Business Interest			
Other Assets			

### Insurance Plans

Life Insurance Net Cash Values			
Annuities			

### Retirement Plans

IRA			
401(k) Profit Sharing			
Keogh			
TDA			
SEP/SIMPLE			

### Non-Working Assets

Automobile			
Personal Property			

### Other Liabilities

Credit Cards		
Home Equity Loans		
Other Loans		

## PERSONAL CASH FLOW WORKSHEET

<b>Income</b>	<b>Monthly</b>	<b>Annually</b>	<b>Expenses</b>	<b>Monthly</b>	<b>Annually</b>
Salary-Husband			Mortgage or Rent		
Salary-Wife			Property Taxes		
Self Emplmnt-H			Utilities		
Self Emplmnt-W			Telephone		
Interest/Dividends			Cable TV		
Pensions/Alimony			Internet		
Social Security			Home Maintenance		
Rental Property (Net)			Childcare		
Other			Car Payments		
<b>Total Income</b>			Gasoline		
			Auto Maintenance		
<b>Taxes</b>			License Fees		
Federal			Tolls/Bus/Parking		
State and Local			Groceries		
Husband:			Work Lunches		
Self Employment			School Lunches		
OASDI			Snacks		
Medicare			Clothing		
			Furnishings		
Wife:			Personal Care/Cash		
Self Employment			Medical/Dental		
OASDI			Prescription		
Medicare			Education/Self Improv		
<b>Total Taxes</b>			Installment Payments		
			Debt		
<b>Insurance</b>			Dining Out		
<b>Premiums</b>			Recreation		
Liability			Gifts (x-mas,birthdays)		
Homeowner's			Vacations		
Medical			Charitable Contributions		
Long-Term Care			<b>Total Expenses</b>		
Automobile					
<b>Total Premiums</b>					