

# Planning Worksheet

## About You and Your Family...

Name: \_\_\_\_\_ Partner Name: \_\_\_\_\_  
 Children / Grandchildren: \_\_\_\_\_  
 Best time to reach you: \_\_\_\_\_  
 Email: \_\_\_\_\_ Phone: \_\_\_\_\_

## What's important to you?

Rank the importance of the following:	Low					High
	1	2	3	4	5	6
Consolidating debt	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Finding more "room" in my budget	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fixing or building credit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Establishing emergency savings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Saving for a new car	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Saving for children's education	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Purchasing, building or remodeling a home	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Retirement planning	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Upcoming major events or purchases	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

## Housing

Do you  Own  Rent Monthly Payment \$ \_\_\_\_\_

Current estimated market value of your home \$ \_\_\_\_\_

## About Your Employment...

Employer: \_\_\_\_\_ Position / Title \_\_\_\_\_ Years: \_\_\_\_\_  
Spouse / Other Employment \_\_\_\_\_ Position / Title \_\_\_\_\_ Years: \_\_\_\_\_  
Yearly Household Income (Gross): \_\_\_\_\_

## About Your Current Accounts...

Account	Rate	Balance	Financial Institution
Mortgage			
Home Equity			
Auto Loan			
Checking			
Savings			
Investing			
Insurance			
Credit Cards			
Other			

## Tell me what you like about your current financial institution?

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## Notes...

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