Confidential
Data Gathering Form

REVIEW SERVICES, INC.
FINANCIAL COUNSELORS
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PERSONAL DATA:

	Client	Co-Client
Name		
Date of Birth		
Social Security Number		
Driver's License Number & Expiration Date		
Address		
Home Phone		
Cell Phone		
Personal Email		
Wedding Anniversary		

EMPLOYMENT INFORMATION:

	Client	Co-Client
Employer		
Occupation		
Years Employed		
Work Phone/Extension		
Work Email		
Annual Salary	$	$
Bonus	$	$
Retirement Plan website, User ID and Password		
Expected Retirement Year (in known)		
If retired, date retired?		

FAMILY MEMBERS: (List children and other dependents)

Name	Relationship	Date of Birth	Social Security Number	% of College You Wish to Pay

FINANCIAL DATA

CASH RESERVE ASSETS: (Checking, Savings, Money Market, HSA, CDs)

Bank	Account Type	Average Balance	Owner(s)	Maturity Date (if applicable)
		$		
		$		
		$		
		$		
		$		
		$		

INVESTMENTS: (IRAs, 401(k), 403(b), TSA, Trust, Individual, Joint, etc.)

Brokerage Firm	Account Type	Market Value	Owner(s)	Beneficiary (if applies)
		$		
		$		
		$		
		$		
		$		
		$		

ANNUITIES:

Annuity Company	Basis (if known)	Currrent Value	Annuitant / Owner	Beneficiary (if applies)
	$	$		
	$	$		
	$	$		
	$	$		

PROPERTY ASSETS: (Home, vacation home, rental property, etc)

Asset	Current Value	Owner(s)
Personal Property (Cars, Furnishings, Jewelry, etc.)	$	
	$	
	$	
	$	

LIFE INSURANCE: (Individual or Group / Work)

Insurance Company	Cash Value (if applies)	Death Benefit	Insured	Beneficiary (if applies)
	$	$		
	$	$		
	$	$		
	$	$		

LIABILITIES: (Mortgage, Car, Home Equity, Credit Card Balances, etc.)

Loan	Loan Balance	Monthly Payment	Owner	Interest Rate / Term
	$	$		
	$	$		
	$	$		
	$	$		

PLANNING QUESTIONS:

How much income per month, in today's dollars, would you like to have at retirement?	$______ per month
How much income per year would you want your family to have in the event of your death? (Normally, no less than 75% of current family income.)	$______ per year
How much income tax did you pay last year?	$_______
What is your tax bracket?	_____%
How much per month are you saving now?	$______ per month
How much more per month could you invest?	$______ per month
How much could you invest lump sum?	$_______
Do you have a will? YES or NO If yes, when was it last reviewed? _____________	
Are you expecting an inheritance? YES or NO If yes, when?_______________	

COMMENTS:

Please list any other information you would like to share.