

Financial Planning Profile

Today's Date: _____

Name: _____	Date of Birth: _____	SSN: _____
Address/city/state: _____	Postal code: _____	Phone [H]: _____
Email: _____	Phone [W]: _____	Phone [C]: _____
Employer/title: _____	Years: _____	Salary: _____
Spouse's name: _____	Date of Birth: _____	SSN: _____
Employer/title: _____	Years: _____	Salary: _____
Dependent name: _____	Date of Birth: _____	SSN: _____
Dependent name: _____	Date of Birth: _____	SSN: _____
Dependent name: _____	Date of Birth: _____	SSN: _____

MONTHLY EXPENSES

Home: \$	Phone/Cable/Web: \$	Clothing: \$	Taxes: \$
Home Ins: \$	Utilities: \$	Spending/Cash: \$	Other: \$
Auto: \$	Groceries: \$	Memberships: \$	Other: \$
Auto Ins: \$	Dining Out: \$	Child Care: \$	Other: \$
Gas: \$	Home Heating: \$	Charity: \$	Other: \$

NET WORTH

Assets/Investments

Home [market value]:		
Employer Plan [company]:	amount: \$	interest rate:
Employer Plan [company]:	amount: \$	interest rate:
Employer Plan [company]:	amount: \$	interest rate:
Savings [company]:	amount: \$	interest rate:
Savings [company]:	amount: \$	interest rate:
Savings [company]:	amount: \$	interest rate:
Investments [company]:	amount: \$	account type:
Investments [company]:	amount: \$	account type:
Investments [company]:	amount: \$	account type:
Other [please describe]:	amount: \$	
Other [please describe]:	amount: \$	

Liabilities

Mortgage Company:	amount owed: \$	interest rate:
Credit Card Company:	amount owed: \$	interest rate:
Credit Card Company:	amount owed: \$	interest rate:
Auto Loan Company:	amount owed: \$	interest rate:
Auto Loan Company:	amount owed: \$	interest rate:
Other Liabilities:	amount owed: \$	interest rate:

LIFE GOALS

	Year of completion	Amount [today's value]

NOTES