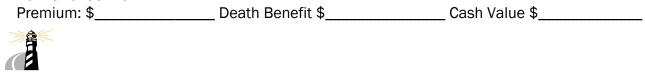
Agent Name: Phone: Email: Name: M □ F □ Desired Retirement Age: Spouse Name: M □ F □	ANTHONY JACOBS FINANCIAL, LLC. Birth Date:/ Birth Date:/
Desired Retirement Age: Number of Children: Ages,,, State of Issue:	,,
Current Concerns	
□ Controlling Spending	□ Creating your own Family Bank
☐ Eliminating Debt	□ Wills/Trust
□ Reducing Taxes	☐ Asset Protection
☐ Providing for children's or grandchildren's education	☐ Estate Planning
☐ Maximizing Savings	
Future Expenditures:	
·	
- 	
Real Estate	
Personal Residence Information:	
Mortgage Payment (P&I only) \$ Term Remaining Outstanding Mortgage \$ Term Remaining Type of Mortgage (check one & circle applicable term)	years Interest Rate:%
☐ Fixed Term (30 year, 15 year, etc.) ☐ ARM (5 yr, 7 yr, 2	10 yr, etc.) Interest Only
Other Property Owned:	
Mortgage Payment (P&I only) \$ Outstanding Mortgage \$ Term Remaining Type of Mortgage (check one & circle applicable term) □ Fixed Term (30 year, 15 year, etc.) □ ARM (5 yr, 7 yr, 2	
= (55 jea., 25 jea., 500)	=croot cing



Debt Related Please list any outstanding debts other than mortgages Name **Amount Owed Interest Rate** Minimum Payment Actual Payment ____ % \$ \$ _____ \$ _____ % % ____% ____% % % \$ % ____% % _____% Insurance **Husband Life Insurance** General Health: ___ Preferred □ Standard Non-tobacco: □ Tobacco: □ Permanent or Term Yearly Premium: \$_____ Death Benefit \$____ Cash Value \$_____ Permanent or Term Premium: \$_____ Death Benefit \$____ Cash Value \$_____ Wife Life Insurance General Health: ___ Preferred □ Standard Non-tobacco: □ Tobacco: □ Permanent or Term Premium: \$_____ Death Benefit \$____ Cash Value \$_____



Permanent or Term

Income & Expense	S				
MONTHLY Gross Incom	me Husband		Wife		
Wages/Salary Social Security Pension Investment Income Rental Income Other Income Total Income Desired Retirement Income Do you expect a signif	\$\$ \$\$ \$\$ \$\$ icome \$	sh flow in the ne	\$ear future?	Yes No	
If yes, please explain:					
					
Investment Accour	nts: Non-Oualifie	ed Accounts. (Dualified Acc	counts. Savings	s Accounts
Investment Accour	-		-		s Accounts
	-	e IRA, Roth, 401K	, 403b, 457, Sa	avings, etc.	s Accounts
Ch Financial Institution	List account type eck the box if the ac	e IRA, Roth, 401K ccount value, con	, 403b, 457, Satributions, or bo	avings, etc. oth are available	ution Available?
Ch Financial Institution	List account type eck the box if the ac Account Type	e IRA, Roth, 401K ccount value, cont Account Valu	403b, 457, Satributions, or both	avings, etc. oth are available Monthly Contrib	ution Available?
Ch Financial Institution	List account type eck the box if the ac Account Type	e IRA, Roth, 401K, ccount value, cont Account Valu \$	403b, 457, Satributions, or both	avings, etc. oth are available Monthly Contrib	ution Available?
Ch Financial Institution	List account type eck the box if the ac Account Type	Account Value, \$, 403b, 457, Sa tributions, or bo le Available?	avings, etc. oth are available Monthly Contrib \$	ution Available?
Ch Financial Institution	List account type eck the box if the ac Account Type	Account Value \$ \$, 403b, 457, Satributions, or bo	avings, etc. oth are available Monthly Contrib \$	ution Available?
Ch Financial Institution	List account type eck the box if the ac Account Type	Account Value \$ \$ \$ \$ \$, 403b, 457, Satributions, or bo	avings, etc. oth are available Monthly Contrib \$	ution Available?
Ch Financial Institution	List account type eck the box if the ac Account Type	Account Value \$ \$ \$ \$ \$ \$, 403b, 457, Satributions, or bo	avings, etc. oth are available Monthly Contrib \$	ution Available?
Ch Financial Institution	List account type eck the box if the ac Account Type	PIRA, Roth, 401K, ccount value, contact value, contact value, contact value, s	, 403b, 457, Satributions, or bo	avings, etc. oth are available Monthly Contrib \$ \$ \$ \$ \$ \$ \$	ution Available?



Redirected Money

Monthly Over-Payments from Debts	
Monthly Contribution to Investments	
Spending Planner (Found discretionary money)	
Amount to Pull from Qualified Accounts (5% to 10% a year or 72T)	
Amount to Pull from non-Qualified Accounts	
1035 Exchange	
Life Ins. Premium Being Replaced Monthly	
Other Available Money (Future)	
Total:	

Producer's thoughts on case:

