Date:\_\_\_

### **Financial Profile Form**

Your personal data is kept confidential



Step 1: Complete and verify the following information to receive a complete analysis of your current financial standing.

- Step 2: Please return completed and signed forms to Allgen before your next appointment. Phone: (407) 210-3888
  - Email: planning@allgenfinancial.com or Fax: (407) 210-3887 or Mail: 100 W Lucerne Circle, Suite 200, Orlando, FL 32801

### **1. Basic Personal Information (Please Print)**

Full Name				Date of Birth		Ema	il Address
Work Phone Nun	nber	Home Phone Nun	nber	Mobile Phone I	Number	Fax	Number
Home Address						Occ	upation
Employer				Years With En	nployer	Gros	ss Annual Income
Marital Status:							
□ Married	Engaged	□ Single	Domest	tic Partnership	□ Widowe	d	□ Previous Marriages?
Country of Citizer	nship	Best Time to C	ontact You:	□ Mor	ning 🗆 Af	ternoon	□ Evening

#### 2. Spouses/Partner Information

Full Name		Date of Birth	Email Address
Work Phone Number	Home Phone Number	Mobile Phone Number	Fax Number
Home Address			Occupation
Employer		Years With Employer	Gross Annual Income

#### 3. Children/Dependents

Number of Children/Dependents (including non-dependent children):

 $\Box 0 \Box 1 \Box 2 \Box 3 \Box 4 \Box 5 \Box \_$ 

Name	Date of Birth	Special Needs?	% of college tuition you would like to contribute	Monthly Savings

### **Financial Profile Form**

Your personal data is kept confidential



4. Retirement Info					
Are you currently contr	ibuting to a retirement pla	an? □ Yes	🗆 No		
At what age do you se	e yourself retiring?	Y	our spouse?		
If you were to retire to	day, how much monthly o	or annual income wo	uld you need	?\$	
How well have you pla	nned for retirement?				
Not well at all	Some	Can't Complain	We	ell Ve	ry Well
Retirement/Education	on Savings				
	Total	Value Person 2		Person 1	hly Savings Person 2
401K/403(b)	Person 1 \$	\$	\$		\$
Simple IRA/SEP IRA	\$	\$	\$		\$
IRA	\$	\$	\$		\$
Roth IRA	\$	\$	\$		\$
Other Retirement Plans	\$	\$	\$		\$
Employer Match (% or \$)					
Social Security Income (Projected or Actual)	At Age 62	At FRA	ge 66/67	At Age 70	
Person 1's Monthly Benef					
Person 2's Monthly Benef	.t				
5 Insurance Info	rmation – Risk Man	agement			
	rmation – Risk Man		- D. Service		
	rmation – Risk Man you leave your family with		e living your c	urrent lifestyle?	?
		the ability to continu	e living your c Pretty Imp	-	ery Important
How important is it that Very Unimportant	you leave your family with Somewhat Important	n the ability to continu Important		-	
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## **Net Worth Statement**



Financial Freedom for All Generations

Assets Value of what you OWN	Liabilities Value of what you OWE
Cash	
Cash/Checking Savings, CDs, T-bills Life Insurance Cash value	Mortgage Line of credit Auto Ioan 1 Auto Ioan 2 Credit card(s) Total
Employer Plan - Self Employer Plan - Spouse IRA/Roth IRA - Self IRA/Roth IRA - Spouse Other Other	Consumer Loans/         Installments Loan         on Life Ins.         Business         Student Loans
Investments Securities (stocks, bonds, mutual funds) Annuities Educational fund Other Investments	Other
Property Primary Residence* Investment Real Estate Automobile 1** Automobile 2 ** * Jewelry, Art and Collectibles Other property	TOTAL ASSETS TOTAL LIABILITIES  NET WORTH Total Assets-Total Liabilities
Business Value of Business TOTAL ASSETS	While most Americans focus on their credit score, which tracks your debt, we focus on your Net Worth, which tracks your wealth. By understanding your Net Worth, you will
For FMV, use www.zillow.com **For FMV, use www.kbb.com	be able to track your financial well being and watch it grow!

# **SPENDING PLAN**

Net Income Per Month (Take Home)



Salary 2         Interest/Dividends         Social Security         Pension         Rental property         Other         Total INCOME         Charitable Giving         Savings & Investments         Savings & Investments         Savings & Investments         Savings Retirement (IRA, Roth)         Total         Mortgage/Rent         Line of credit         Taxes         Utilities (Power, water)         Cable/Internet         Telephone         Maintenance         Lawn         Other         Other         Total         Mortgage/Rent         Line of credit         Taxes         Utilities (Power, water)         Cable/Internet         Total         Maintenance         Lawn         Activities (movies, games, concerts)         Vacations         Total         Automobile         Gas       Personal (hair, makeup)         Maintenance       Drusinging/Home Decor
Social Security       Medical Expenses         Pension       Co-Payment(s)         Rental property       Dental         Other       Prescription         Total INCOME       Other         Total       Clothing         Savings & Investments       School/Child Care         Savings       Tuition         Educational Savings       Children's activities         Retirement (IRA, Roth)       Babysitting         Total       Other
Pension       Co-Payment(s)         Rental property       Dental         Other       Prescription         Total INCOME       Other         Total INCOME       Clothing         Savings & Investments       School/Child Care         Savings & Investments       School/Child Care         Savings & Investments       Children's activities         Educational Savings       Tuition         Retirement (IRA, Roth)       Babysitting         Total       Other
Rental property       Dental         Other       Prescription         Total INCOME       Other         Charitable Giving       Clothing         Savings & Investments       School/Child Care         Savings Retirement (IRA, Roth)       Babysitting         Total       Other
Other       Prescription         Total INCOME       Other         Total       Total         Charitable Giving       Clothing         Savings & Investments       School/Child Care         Savings       Tuition         Educational Savings       Children's activities         Retirement (IRA, Roth)       Babysitting         Total       Other
Total INCOME       Other
Total         Charitable Giving         Savings & Investments         Savings         Savings         Educational Savings         Retirement (IRA, Roth)         Total         Housing         Mortgage/Rent         Line of credit         Taxes         Utilities (Power, water)         Cable/Internet         Telephone         Maintenance         Lawn         Activities (movies, games, concerts)         Vacations         Total         Automobile         Car Payment(s)         Maintenance         Car Payment(s)         Maintenance         Data         Miscellaneous         Car Payment(s)         Maintenance         Descolar         Personal (hair, makeup)         Dry Cleaning
Charitable Giving     Clothing       Savings & Investments     School/Child Care       Savings     Tuition       Educational Savings     Children's activities       Retirement (IRA, Roth)     Babysitting       Total     Other       Housing     Total       Mortgage/Rent     Debts       Line of credit     Credit Card(s)       Taxes     Student Loans       Utilities (Power, water)     Other
Savings & Investments       School/Child Care         Savings       Tuition         Educational Savings       Children's activities         Retirement (IRA, Roth)       Babysitting         Total       Other         Housing       Total         Mortgage/Rent       Debts         Line of credit       Credit Card(s)         Taxes       Student Loans         Utilities (Power, water)       Other
Savings       Tuition         Educational Savings       Children's activities         Retirement (IRA, Roth)       Babysitting         Total       Other         Housing       Total         Mortgage/Rent       Debts         Line of credit       Credit Card(s)         Taxes       Student Loans         Utilities (Power, water)       Other
Educational Savings       Children's activities         Retirement (IRA, Roth)       Babysitting         Total       Other         Housing       Total         Mortgage/Rent       Debts         Line of credit       Credit Card(s)         Taxes       Student Loans         Utilities (Power, water)       Other         Cable/Internet       Other         Telephone       Total         Maintenance       Entertainment         Lawn       Activities (movies, games, concerts)         Other       Vacations         Total       Total         Automobile       Miscellaneous         Car Payment(s)       Personal (hair, makeup)         Maintenance       Dry Cleaning
Retirement (IRA, Roth)       Babysitting         Total       Other
Retirement (IRA, Roth)       Babysitting         Total       Other
Total       Other
Housing       Total         Mortgage/Rent       Debts         Line of credit       Credit Card(s)         Taxes       Student Loans         Utilities (Power, water)       Other
Mortgage/Rent       Debts         Line of credit       Credit Card(s)         Taxes       Student Loans         Utilities (Power, water)       Other
Line of credit Credit Card(s) Taxes Student Loans Utilities (Power, water) Other Cable/Internet Other Telephone Total Maintenance Entertainment Lawn Activities (movies, games, concerts) Vacations Other Vacations Total Total Automobile Miscellaneous Car Payment(s) Personal (hair, makeup) Maintenance Dry Cleaning
Taxes       Student Loans         Utilities (Power, water)       Other
Utilities (Power, water)       Other         Cable/Internet       Other         Telephone       Total         Maintenance       Entertainment         Lawn       Activities (movies, games, concerts)         Other       Vacations         Total       Total         Automobile       Miscellaneous         Car Payment(s)       Personal (hair, makeup)         Maintenance       Dry Cleaning
Cable/Internet       Other
Telephone     Total       Maintenance     Entertainment       Lawn     Activities (movies, games, concerts)       Other     Vacations       Total     Total       Automobile     Miscellaneous       Car Payment(s)     Personal (hair, makeup)       Maintenance     Dry Cleaning
Maintenance       Entertainment         Lawn       Activities (movies, games, concerts)         Other       Vacations         Total       Total         Automobile       Miscellaneous         Car Payment(s)       Personal (hair, makeup)         Maintenance       Dry Cleaning
Other     Vacations       Total     Total       Automobile     Miscellaneous       Car Payment(s)     Personal (hair, makeup)       Maintenance     Dry Cleaning
Other     Vacations       Total     Total       Automobile     Miscellaneous       Car Payment(s)     Personal (hair, makeup)       Maintenance     Dry Cleaning
TotalTotalAutomobileMiscellaneousCar Payment(s)Personal (hair, makeup)MaintenanceDry Cleaning
Car Payment(s)     Personal (hair, makeup)       Maintenance     Dry Cleaning
Maintenance Dry Cleaning
Gas Furnishings/Home Décor
Tolls Subscriptions
Total     Gifts (incl. Christmas)
Food Gym
Grocery
Dining out Cash
Total Other
Insurance Premiums Total
Homeowners
Auto Total INCOME
Medical
Medical
Medical Total EXPENSES