



Pension and Retirement Strategies

## PERSONAL INFORMATION WORKSHEET

The following information will cause our initial meeting to be more time efficient!

	<b>Date of Birth:</b>	<b>Home Address:</b>
Client A: _____	____ / ____ / ____	_____
Client B: _____	____ / ____ / ____	_____
Children: _____	____ / ____ / ____	Home Phone: _____
_____	____ / ____ / ____	Cell Phone: _____
_____	____ / ____ / ____	Email: _____
_____	____ / ____ / ____	

Best time to contact: \_\_\_\_\_

Employment Information		
	Client A	Client B
Occupation / Title		
Employer		
Work Phone		
Fax Number		
Work E-mail Address		
Business Address		
Years in Pension		
# of Buy Back Years		
Years in District		
Early Retirement?		
Do you anticipate any change in your current job/career/position?    r Yes    r No		
How secure do you feel with your current job?		

### List of "tax deductible" interest loans

<u>Type:</u>	<u>Current Balance:</u>	<u>Monthly Payment</u>	<u>Present Value</u>
1 <sup>st</sup> Mortgage	_____	_____	_____
2 <sup>nd</sup> Mortgage	_____	_____	_____

### List "non-tax deductible" interest loans (Auto, Credit Cards, Student Loans, etc.)

<u>Type:</u>	<u>Current Balance:</u>	<u>Monthly Payment</u>	<u>Present Value</u>
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____