# ***CONFIDENTIAL PERSONAL FINANCIAL PROFILE***

Client Name(s):___________________________

Date Of Birth:____________________________

Sex: M / F  Smoking: Y / N

Health Rating: Super / Pref. / Stnd / Table ____

Married or Single:________________________

Age to Begin Income:______________________

Single/Combined Gross Income:____________________

Net Taxable Income:$______________________________

State Tax Bracket________% Federal _________%

Primary Residence Fair Market Value:_________________

Second Residence Fair Market Value: _________________

Verifiable Cost of Improvement:$_____________________

Verifiable Cost of Improvement:$_____________________

| Mortgages | | | | | | |
|---|---|---|---|---|---|---|
| | Date | Org. Amount | Term/Type | Interest Rate | Payment | Remaining Balance |
| 1st Mortgage | | | | | | |
| 2nd Mortgage | | | | | | |
| New Mortgage | | | | | | |
| 1st Mortgage *(2nd Property)* | | | | | | |
| 2nd Mortgage *(2nd Property)* | | | | | | |
| New Mortgage | | | | | | |

| | Amount / Balance | Type | Return / Interest Charge | Contribution / Payments | Reroute Contributions | Reposition / Pay-off |
|---|---|---|---|---|---|---|
| Asset | | | | | | |
| Asset | | | | | | |
| Asset (Qualified $) | | | | | | |
| Asset (Qualified $) | | | | | | |
| Liability | | | | | | |
| Liability | | | | | | |
| Liability | | | | | | |
| Liability | | | | | | |
| Other: L / A | | | | | | |
| Other: L / A | | | | | | |
| Other: L / A | | | | | | |

| Current Insurance | Type | Company | Face | Annual Premium | Cash Value | Reroute Contributions | Reposition via 1035 Exchange |
|---|---|---|---|---|---|---|---|
| | | | | | | | |
| | | | | | | | |

**GOAL(S) TO ACCOMPLISH:**

Begin roll-out of Qualified Plan at age _____for _____years.
Compare to various financial alternatives: MF _____%, IRA/401(k) _____%, AN _____%, CD _____%

1. ____________________________________________________________________________
2. ____________________________________________________________________________
3. ____________________________________________________________________________
4. ____________________________________________________________________________

Please fax this directly to the Home Equity Department: **(858) 408-2448**

*48-72 hour turnaround time on full Missed Fortune quotes*