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**PERSONAL DATA**

Name(s): \_\_\_\_\_

Home Address: \_\_\_\_\_

City, State, Zip: \_\_\_\_\_

Home Phone: \_\_\_\_\_ Private Fax: \_\_\_\_\_

Employer(s): \_\_\_\_\_

Work Phone(s): \_\_\_\_\_

Cell Phone(s): \_\_\_\_\_

Email(s): \_\_\_\_\_

Birthday(s): \_\_\_\_\_ Citizenship: \_\_\_\_\_

Preferable means of contact during business hours: Email or Phone

Relationship status: \_\_\_ Single \_\_\_ Married \_\_\_ Life Partner  
\_\_\_ Legally Separated \_\_\_ Divorced \_\_\_ Widowed

<u>Family Member</u>	<u>Relationship</u>	<u>DOB</u>	<u>Dependent?</u>	<u>Resides?</u>
_____	_____	___/___/___	Y_N	_____
_____	_____	___/___/___	Y_N	_____
_____	_____	___/___/___	Y_N	_____

Have you been married previously? \_\_\_\_\_

Do you plan to have or adopt children? When? \_\_\_\_\_

Will you have financial responsibility for anyone in the future? If so, who? When?

*Please complete this individually and separately. In other words, a couple will turn in 2 of these worksheets.*

### **CLARIFYING GOALS AND PRIORITIES**

My 10 most important life priorities (in order):

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.
- 8.
- 9.
- 10.

In order to direct my financial resources to my top 10 priorities, I would choose to reduce or eliminate these 3 areas:

- 1.
- 2.
- 3.

It's important to me to:

- Pay off \$\_\_\_\_\_ in debt by this date: \_\_\_\_\_
- Complete paying off all debt by this date: \_\_\_\_\_
- Begin saving \$\_\_\_\_\_ annually by this date: \_\_\_\_\_

(These dates can overlap – in other words, it is possible to start saving when you have low-interest rate debt.)

**FINANCIAL DATA - Income**

**ANNUAL INCOME**

Gross Salary or Wages	_____
Bonus/Commissions/Tips	_____
Net Business Income or Rental Income	_____
Investment Income (interest, dividends)	_____
Alimony	_____
Child Support	_____
Trust Income	_____
Gifts	_____
Social Security	_____
Pension or Annuity Income	_____
Tax Refund	_____
Other: _____	_____
<b>TOTAL GROSS INCOME:</b>	_____

\* If you're self-employed and do not have a salary, please include your Schedule C income for the most recent 2 tax years.

**FINANCIAL DATA – Assets & Liabilities**

**ASSETS**

Bank and Credit Union Accounts \_\_\_\_\_  
Investment Accounts: Mutual Funds, Stocks, Bonds \_\_\_\_\_  
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Retirement Accounts – 401k, 403b, IRAs \_\_\_\_\_  
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Insurance Accounts – Annuities, Cash Value \_\_\_\_\_  
Other Accounts - ESOP \_\_\_\_\_  
Home (approximate market value) \_\_\_\_\_  
Rental Home (approximate market value) \_\_\_\_\_  
Land (approximate market value) \_\_\_\_\_  
Vehicles (trade in value) \_\_\_\_\_  
Private Loans Due You \_\_\_\_\_  
Other: \_\_\_\_\_

TOTAL ASSETS: \_\_\_\_\_

**DEBTS**

Home Mortgage \_\_\_\_\_  
Rental Home Mortgage \_\_\_\_\_  
Home Equity Loan or Line of Credit \_\_\_\_\_  
Credit Card Balance(s) – if not paid in full monthly \_\_\_\_\_  
Auto Loan(s) \_\_\_\_\_  
Private Loan(s) \_\_\_\_\_  
Student Loan(s) \_\_\_\_\_  
Other: \_\_\_\_\_

TOTAL DEBTS: \_\_\_\_\_

## FINANCIAL DATA – Credit Card and Loans Details

### Credit Card Data

<i>Name Of Card</i>	<i>Interest Rate</i>	<i>Total Balance</i>	<i>Minimum Payment</i>	<i>Monthly Payment</i>

### Loan Data

<i>Type Of Loan</i>	<i>Interest Rate</i>	<i>Total Balance</i>	<i>Minimum Payment</i>	<i>Monthly Payment</i>

**For your fixed loans, when will the payments end?**