

Name(s)	DOB	Phone	Annual Income	Bonus
<input type="text"/>				
<input type="text"/>				

Address

Name of dependent(s)	Age	Name of dependent(s)	Age
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

**Goals**

	Short-Term 1-3 Years	Mid-Term 3-7 Years	Long-Term 7+ Years
Build retirement wealth	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Create guaranteed retirement income	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Buy new home	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Set up emergency fund	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fund education	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Support parents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Start a business	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Financial Questions**

End-of-the-month amount you can allocate to goals

Previous year's tax refund

Existing college plans

If applicable, what are your parents' plans for long-term care?

Do you want a complimentary analysis of options that could help you maximize Social Security income?

Yes  No

Do you have a will and/or a trust?

Yes  No

Do you have a long-term care policy?

Yes  No

Do you have a pension?

Yes  No

# Life Insurance

Insured	Company	Type	Amount	Cash Value	Premium	Year Issued

Assets	Tax Now		Tax Later		Tax Never	
	BALANCE	MONTHLY CONTRIB.	BALANCE	MONTHLY CONTRIB.	BALANCE	MONTHLY CONTRIB.
MUTUAL FUNDS					ROTH IRA	
BROK. ACCTS. / STOCKS / BONDS			ANNUITIES (FIXED / VARIABLE)			
CHECKING / SAVINGS / CD'S			TRAD. IRA / SEP IRA		CASH VALUE LIFE INSURANCE	
			401(K) / 403(B) / OTHER QUAL. PLAN		EMPLOYER MATCH	

# Other

Any other assets or expenses to consider? (expected inheritances, child w/ special needs, etc.)

*The Money Discovery Form, developed by WealthWave, LLC, is based on the accuracy and completeness of the information provided by the client. The analysis uses sources that are believed to be reliable and accurate, although they are not guaranteed. Discuss any legal, tax or financial matter with the appropriate professional. Neither the information presented nor any opinion expressed constitutes solicitation for the purchase or sale of any specific product or financial service. WealthWave, LLC does not offer tax and/or legal advice. Please consult with your personal tax and/or legal professional for further guidance.*