



PENNY LANE
FINANCIAL

Confidential Information Form

Client 1

First Name: _____

Last Name: _____

DOB: _____

Male: _____ Female: _____

Email: _____

Phone: _____

Cell _____ Home _____ Work _____

Address: _____

City: _____ State: _____ Zip: _____

Are you retired? Yes _____ No _____

If yes, when did you retire? _____

What age do you plan on retiring? _____

Do you intend to work in retirement?

Yes _____ No _____

Are you currently receiving Social Security Benefits? Client 1 _____ Client 2 _____

What is your monthly benefit? \$ _____

When did it start? _____

How much is anticipated if not taking benefit currently?

Client 1 \$ _____

Client 2

First Name: _____

Last Name: _____

DOB: _____

Male: _____ Female: _____

Email: _____

Phone: _____

Cell _____ Home _____ Work _____

Address: _____

City: _____ State: _____ Zip: _____

Are you retired? Yes _____ No _____

If yes, when did you retire? _____

What age do you plan on retiring? _____

Do you intend to work in retirement?

Yes _____ No _____

What is your monthly benefit? \$ _____

When did it start? _____

Client 2 \$ _____

How much are your current household monthly expenses? \$ _____

How much income do you need in order to retire comfortably? \$ _____ (Gross)

If still working, annual income? \$ _____ (Gross)



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Current Assets:

Checking/Savings \$ _____

Retirement accounts (IRA, 401(k), Roth IRA, Pension, 403(b), etc.) \$ _____

Annuities \$ _____

Stocks, bonds, Mutual Funds \$ _____

Real Estate \$ _____

Other \$ _____

Do you have a retirement income plan? Yes _____ No _____

Who do you turn to for financial advice? _____

Do you currently have life insurance? Yes _____ No _____ Coverage amount? _____

What type? Term _____ Whole Life _____ Universal Life _____ Indexed Universal Life _____ Variable Life _____

What are the primary reasons why you purchased life insurance _____

Do you have any major health concerns? Yes _____ No _____

Do you have any Long Term Care protection? Yes _____ No _____

Anything else you'd like us to know/notes/thoughts _____

Thank you