CLAIM WISE
STRATEGIZE. OPTIMIZE. CLAIMWISE.

## Client Profile

First Name ___________________________ Last Name ___________________________ DOB __________

First Name ___________________________ Last Name ___________________________ DOB __________

Email Address ____________________________________________________________________________

Cell Phone _________________________________ Home Phone _________________________________

Married? ______________ Divorced? _________________ Widowed? ____________________________

## Social Security Details

Are you currently working? Yes | No
If Yes, how long are you planning to work? _________ years

Are you currently receiving Social Security Benefits? Yes | No
I Yes, what is the monthly benefit amount? $____________ When did you claim? __________________

Is your spouse currently working? Yes | No
If Yes, how long are they planning to work? _________ years

Is your spouse currently receiving Social Security Benefits? Yes | No
If Yes, what is the monthly benefit amount? $____________ When did they claim? _________________

## Future Covered Earnings

Estimated Future Annual Earnings $ _________________________ Until Age ______________________

Spouses Future Annual Earnings $ _________________________ Until Age ______________________

## Income Needs

| | Client | Spouse |
|---|---|---|
| Desired Retirement Age . . . . . . . . . . . | __________________________ | ___________________________ |
| Income Needed Now . . . . . . . . . . . . . | __________________________ | ___________________________ |
| Income Needed at Retirement . . . . . . | __________________________ | ___________________________ |

## Assets

| | Client | Spouse |
|---|---|---|
| Home Value . . . . . . . . . . . . . . . . . . . | ___________________________ | ___________________________ |
| Mortgage Balance . . . . . . . . . . . . . . . | ___________________________ | ___________________________ |
| Mutual Funds . . . . . . . . . . . . . . . . . . | ___________________________ | ___________________________ |
| (Qualified or Non-Qualified?) . . . . . . | ___________________________ | ___________________________ |
| Annuities<br>(Qualified or Non-Qualified?) . . . . . . | ___________________________ | ___________________________ |
| Managed Accounts . . . . . . . . . . . . . . | ___________________________ | ___________________________ |
| Individual Stocks . . . . . . . . . . . . . . . . | ___________________________ | ___________________________ |
| Individual Bonds . . . . . . . . . . . . . . . . | ___________________________ | ___________________________ |
| Retirement Accounts, IRA, 401k . . . . | ___________________________ | ___________________________ |
| Liquid Funds, Bank Products, . . . . . . .<br>CDs, Checking, Savings | ___________________________ | ___________________________ |
| Other . . . . . . . . . . . . . . . . . . . . . . . . . | ___________________________ | ___________________________ |

## Notes and Comments

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