

TMFG

The Miller Financial Group



Helping Create More
Favorable Financial Futures

Personal Financial Summary

BASIC INFORMATION:

Your Name	Nickname	Date of Birth	State Born
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Social Security Number	Cell Phone	E-mail address	Home Phone
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Spouse's Name	Nickname	Date of Birth	State Born
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Social Security Number	Cell Phone	E-mail address	
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Residence Address	City	State	Zip
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Mailing Address	City	State	Zip
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How did you hear about The Miller Financial Group?

CHILDREN: If you have any College Saving Plans or Investment Accounts for your children, please provide statements

Name	Date of Birth	Social Security Number	State Born
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Name	Date of Birth	Social Security Number	State Born
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Name	Date of Birth	Social Security Number	State Born
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Name	Date of Birth	Social Security Number	State Born
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GRANDCHILDREN: If you have any College Saving Plans or Investment Accounts for your grandchildren, please provide statements

Name Date of Birth Social Security Number State Born

Name Date of Birth Social Security Number State Born

Name Date of Birth Social Security Number State Born

OCCUPATION:

Your Job Title Employer (last, if retired) Date of Hire Retirement Age

Employer Address Work Phone Work E-mail

Base Salary Bonuses Expected Annual Salary Increase

Spouse's Job Title Employer (last, if retired) Date of Hire Retirement Age

Employer Address Work Phone Work E-mail

Base Salary Bonuses Expected Annual Salary Increase

Additional Income Source Occupation Annual Gross Income Retirement Age

RETIREMENT INFORMATION:

Retirement Income *Needs*

Retirement Income *Wants*

Your Estimated Life Expectancy

Your Spouse's Estimated Life Expectancy

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FAMILY EXPENSES:

Annual Living Expenses		Annual Cost	How long do you expect this expense to last?
Housing (<i>Rent, Mortgage, Taxes, Insurance</i>)	\$		
Car Loan(s)	\$		
Insurance Premiums	\$		
Credit Card Debt	\$		
Education (<i>Loan Payments, College Savings, Tuition</i>)	\$		
Utilities (<i>Gas, Electric, Water, Sewer</i>)	\$		
Technology (<i>Cable, Internet, Phone</i>)	\$		
Medical Expense (<i>Insurance, Prescriptions</i>)	\$		
Child Expenses (<i>Day Care, Child Support</i>)	\$		
Home Improvement	\$		
Groceries	\$		
Eating Out	\$		
Transportation (<i>Gas, Repairs, Insurance, etc.</i>)	\$		
Travel	\$		
Clothing	\$		
Church/Charity	\$		
Entertainment	\$		
Other	\$		
Total	\$		

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Important Documentation

Please gather the most recent version of the following documents in preparation for our next meeting:

Bank statements

Investment statements (e.g. 401(k), 403(b), IRA)

Insurance policy statements

Social Security Statement (www.ssa.gov)

Employer Provided Benefits

Most recent Tax return

A list of any questions or concerns you may have

Important Questions

Are you confident that your current retirement plan will meet your life long retirement income needs? _____

What's more important to you: A the rate of return on your investments, or B the reliability of your income? A or B

What other sources of guaranteed retirement income do you have in addition to Social Security? _____

How many times per a year would you like to meet? _____

Who is your CPA? _____

Who is your attorney? _____

This personal financial summary is designed to help you take inventory and assign realistic values to your personal assets, liabilities, and concerns. It is an essential first step in organizing your financial future. At The Miller Financial Group our mission is to help you make better decisions with your money to create a more favorable financial future. The information you provide in this financial summary will assist us in making sound recommendations with confidence, based on your needs and goals, and is strictly confidential.

Signature

Date

Print Name

Signature

Date

Print Name

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