Thank you for attending our workshop today. We look forward to meeting with you at our scheduled appointment.

Date: ______________________________________

Time: ______________________________________

Please make sure to bring your **most recent** statements for any account you would like to consider for the ***green line***. These can include: stocks, bonds, mutual funds, annuities, cash-value life insurance and CD's with interest rates and maturity dates. Please also bring your completed *Client Financial Inventory and Basis for Recommendation* from the backside of this form. This will help us to analyze your accounts and assess your specific needs.

3706 Harrison Ave, Cincinnati, OH 45211

~ or ~

9420 Towne Square Ave, Suite 4, Blue Ash OH 45242

(Call or text when you arrive to be buzzed into the building.)

Alysa Thornton: 513.918.4175, ext. 2

alysa.t@niehoffandassociates.com

Please See form on back of page --->--->--->

Please complete this form to the best of your knowledge and bring this, along with your account(s) you would like us to take a look at, to your scheduled appointment.

Client Financial Inventory and Basis for Recommendation

Client Name:______________________________________Date: ____________________

I want to put some money into a place that is safe from market risk. ☐ Yes ☐ No

Are you looking for a product where the interest you earn is locked in annually?
☐ Yes ☐ No

Are you comfortable with a product that can have an annual fee? ☐ Yes ☐ No

I would like to purchase a product that provides a death benefit to my beneficiaries.
☐ Yes ☐ No

I would like to purchase a product that can give me an income that I can't outlive.
☐ Yes ☐ No

When would you like income to start from the new annuity? ________________________

Household:
Monthly Income: ___________ Source(s) of Monthly Income: ______________________
Monthly Expenses:___________
Surplus: ___________

Household Net Worth	
Annuities	
Checking/ Savings	
CDs	
Pension Plans	
401k Plans	
Money Market	
Stocks/ Bonds/ Mutual Funds	
Cash Value of Life Insurance	
Land	
Real Estate (exclude primary residence)	
Other (define)	
Net Worth Total	

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