

GAMEPLAN FOR FINANCIAL INDEPENDENCE

- A. MONTHLY COMMITMENT TOWARD FINANCIAL INDEPENDENCE:** \$ _____
- B. CURRENT LEGACY PROTECTION MONTHLY COMMITMENT:** \$ _____
- C. TOTAL MONTHLY COMMITMENT TOWARD FINANCIAL INDEPENDENCE:** \$ _____
- D. NEW LEGACY PROTECTION MONTHLY COMMITMENT:** \$ _____
- E. TOTAL LEFT:** \$ _____
- F. PLPP: (COMP WILL/24 HR ATTORNEY ACCESS)** \$ _____
- G. TOTAL LEFT:** \$ _____
- H. ID THEFT:** \$ _____
- I. TOTAL LEFT:** \$ _____
- J. EMERGENCY FUND:** \$ _____
- K. TOTAL LEFT:** \$ _____
- L. SHORT TERM SAVINGS: (EX: TRAVEL FUND)** \$ _____
- M. TOTAL LEFT:** \$ _____
- N. ROTH** \$ _____
- O. TOTAL LEFT:** \$ _____
- P. ROTH IRA SPOUSE:** \$ _____
- Q. TOTAL LEFT:** \$ _____
- R. COLLEGE FUND:** \$ _____
- S. TOTAL LEFT:** \$ _____

AVERAGE ANNUAL TAX RETURN LAST 3 YEARS: \$ _____. **WILL THEY USE THIS MONEY TO HELP THEM BECOME FI: YES OR NO.** **LEGACY PROTECTION FACE AMTS:** PRIMARY \$ _____ SPOUSE \$ _____

MONTHLY INCOME AMOUNTS NEEDED AT RET: PRI RET AGE _____ \$ _____ **SP RET AGE** _____ \$ _____

EF BALANCE \$ _____ **SO SEC MTHLY AMT PRI \$** _____ **SO SEC MTHLY AMT SP \$** _____

FIN #: PRI \$ _____ **SP \$** _____ **RET BALANCES: PRI \$** _____ **SP \$** _____

DID CLIENT TAKE ADVANTAGE OF FREE AUTO AND HOME QUOTE? PRI YES OR NO _____ **SP YES OR NO** _____

PRIMARY NAME: _____ **CONTACT #** _____

SPOUSE NAME: _____ **CONTACT #** _____

PRIMARY EMAIL: _____ **SP EMAIL:** _____

FLD TRNR NAME/SOL #: _____ **SOL#** _____ **CELL #** _____

NEW REC NAME/SOL #: _____ **SOL#** _____ **CELL #** _____