



# THE DISCOVERY PROFILE™

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Thank you for taking the time to complete The Discovery Profile™. The information you provide is strictly confidential and will only be used for your individual planning purposes. We ask that you complete this profile as fully as you are comfortable with. If you have any questions, please call our office for assistance.

BASIC INFORMATION

Your Name	Nickname	Age	Birthdate	Social Security # (optional)	
Your Job Title	Employer (last, if retired)	# of Years	Work Phone	Retirement Date	
Spouse's Name	Nickname	Age	Birthdate	Social Security # (optional)	
Spouse's Job Title	Employer (last, if retired)	# of Years	Work Phone	Retiremet	
Residence Address		City	State	Zip Code	
Mailing Address		City	State	Zip Code	
Home Phone	Cell Phone	Fax	Email Address		
Referred By: _____			<input type="radio"/> Newspaper	<input type="radio"/> Magazine	<input type="radio"/> Website

**Annual Income**

Your Wages: \$ \_\_\_\_\_

Spouse's Wages: \$ \_\_\_\_\_

Other Income \$ \_\_\_\_\_ Source: \_\_\_\_\_

Other Income \$ \_\_\_\_\_ Source: \_\_\_\_\_

Other Income \$ \_\_\_\_\_ Source: \_\_\_\_\_

Do you anticipate additional income that you are not currently receiving?  Yes  No  Uncertain

If yes, please indicate the source of the income: \_\_\_\_\_

RETIREMENT

1. At what age do you want to retire? \_\_\_\_\_ Your Spouse? \_\_\_\_\_
2. What is the minimum income you will need, in today's dollars, at retirement? \$ \_\_\_\_\_
3. If you plan on working after retirement, estimate your expected income: \$ \_\_\_\_\_
4. What interest rate would you like to earn on your investments? You: \_\_\_\_\_ % Spouse: \_\_\_\_\_ %
5. What do you think inflation will average in the future? \_\_\_\_\_ %

BALANCE SHEET

**Investments** (i.e., checking & savings accounts, money market, IRAs, 401(k)s, stocks, bonds, mutual funds, etc.)  
 You may attach statements instead of filling this section out.

	Account Type	Location	Approximate Value
1.	_____	_____	_____
2.	_____	_____	_____
3.	_____	_____	_____
4.	_____	_____	_____
5.	_____	_____	_____
6.	_____	_____	_____
7.	_____	_____	_____

**Liabilities & Outstanding Debt** (i.e., home, business, credit cards, loans, other long-term debt, etc.)  
 You may attach statements instead of filling this section out.

	Type of Liability	Name of Debtor	Interest Rate	Approximate Balance Due
1.	_____	_____	_____	_____
2.	_____	_____	_____	_____
3.	_____	_____	_____	_____
4.	_____	_____	_____	_____
5.	_____	_____	_____	_____
6.	_____	_____	_____	_____
7.	_____	_____	_____	_____

OTHER

Do you have any other financial concerns that need to be addressed? If so, please describe the issue(s) below:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_