EXPERIOR
FINANCIAL GROUP, INC

Expert Financial Analysis

Trainee's Name:

Client Name _____ DOB _____ Smoker Yes / No

Spouse Name _____ DOB _____ Smoker Yes / No

Children Under 18

Child Name _____ Age _____ Child Name _____ Age _____

Phone number _____ Email _____

Monthly Income

Combined Household Net Income _____ Discretionary _____

Monthly Expenses

Mortgage/Rent _____
Utilities _____
Car Payment _____
Groceries/Food _____
Gas for Vehicles _____

Credit Cards _____
Car Insurance _____
Life Insurance _____
Health Insurance _____
Total Monthly Expenses _____

Assets

Market Value of Home _____
Mutual Fund/ IRA/Roth _____
Retirement Plan/401k _____
Checking/Savings _____
Life Ins/Cash Value _____

Liabilites

Mortgage _____
Other Property _____
Credit Cards _____
Car Loans _____
Other Loans _____

Investments Information

Life ins Co. _____ Monthly Pymt. _____ 10 20 30 yrs or Permanent

Life ins Co. _____ Monthly Pymt. _____ 10 20 30 yrs or Permanent

401k Company _____ Balance _____ Current or Previous Employer

IRA/Roth Company _____ Balance _____

Financial Goals

Age you wish to retire? _____ How much do you need to retire comfortably? _____ / year

Proper Insurable Need

Liability _____
Income _____
Final Expenses _____
Education _____

Total Insurable Need _____

Next Steps

How much could you comfortably set aside each month to reach your goals?

$200 $300 $400 $500 Other $ _____

Next Appt. Date _____ **Time** _____

Zoom or In Person _____