GE Financial Planning Questionnaire

REQUESTED DOCUMENTS, IF APPLICABLE:

- [ ] Personal Financial Statement
- [ ] Investment Statements (401(k), Brokerage, IRA, 529, etc.)
- [ ] Liability Statements (Mortgage, Business, Car, etc.)
- [ ] Insurance Statements (Life, Disability, Long-term Care)
- [ ] Most Recent Paystub
- [ ] Social Security Statements
- [ ] Previous Year's Tax Return
- [ ] Estate Documents (Will, POA, Trust)

REQUESTED GE DOCUMENTS, IF APPLICABLE:

- [ ] RSUs/Stock Options Detail
- [ ] Long-Term Incentive Statement, Investments, Schedules
- [ ] Fidelity RSP Statement & Source Details
- [ ] Deferred IC/ Salary details
- [ ] GE Pension Estimates (Vested/Projected)
- [ ] Leadership Life
- [ ] Beneficiary Statement
- [ ] Insurance Summary
- [ ] Enrollment Summary
- [ ] UBS Statement

	Name	Date of Birth	Phone	Email
Client:	______________	________	________	______________
Spouse:	______________	________	________	______________
Child:	______________	________		
Child:	______________	________		
Child:	______________	________		
Child:	______________	________		

Notes: ____

____

RESIDENCE:

Address: ____

Value: ______________

Mortgage (Balance, Rate, Payment): $ ______________ ______ % $ ______________

GOALS: Client Spouse

At what age(s) would you like to retire? ______ ______

What are you plans for retirement? (Education Funding? Vacation Home? Weddings?):

INCOME:

Source	Whose	Amount	Bonus
Salary:		$_________ /annual	$_________ /annual
Salary:		$_________ /annual	$_________ /annual
Other:		$_________ /annual	$_________ /annual

Notes:

EXPENSES:

Average after-tax monthly spending: $____________

Average estimated leftover income after all savings, expenses, and taxes: $____________

Comments:

BUSINESS INTEREST/RENTAL PROPERTIES (AS APPLICABLE):

Location: ________________________ Ownership %: ____________

Entity Type (Sole Proprietorship, LLC, S Corp, C Corp, Partnership): ________________

Estimate or Actual Value: ________________ Lease Income/Payments: ______________

Debt (Balance, Rate, Payment) $____________ _____% $____________________

Do you plan to sell with business? ________________________________

If multiple, please attach schedules.