

FINANCIAL INTAKE FORM

— EXERTUS FINANCIAL PARTNERS

PERSONAL INFORMATION

Client Name	:		Phone	:	
Street Address	:				
City, State, Zip	:		DOB	:	
E-Mail	:		# of Children	:	
Married	:				

MORTGAGE INFORMATION

Lender	Interest %	Term	Loan Amount	Minimum Payment	Actual Payment
1.					
2.					

DEBT INFORMATION

Car Loan	Student Loan	Credit Card	Personal	Personal
Principal:				
Interest %:				
Minimum Payment:				
Actual Payment:				

INSURANCE INFORMATION

Type	Face Amount	Purpose	Premium	Cash Value	Carrier
1.					
2.					
3.					

ASSETS

Type	Current Value	Purpose	Contribution	Current Employer	Match	Provider
401k						
403b						
457						
IRA						
Pension						
Annuity						
CD						
Savings						
Investment						

Combined Monthly Income: _____ Combined Monthly Expenses: _____

THANK YOU FOR YOUR INFORMATION

FINANCIAL INTAKE FORM

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ESTATE INFORMATION

Do you have a Will?

Last Reviewed

Do you have a Living Will?

Last Reviewed

Have you created a Trust?

Last Reviewed

Do you presently have Powers of Attorney?

Last Reviewed

THANK YOU FOR YOUR INFORMATION