BAKER & CARARA

PRIVATE WEALTH PARTNERS

Personal Information

	Client	Co – Client
Name		
Date of Birth		
Employer Name		
Employment Income	$	$
Other Income	$	$
Social Security Number		
Address		

Beneficiaries

	#1	#2	#3	#4
Name				
Date of Birth				
Social Security Number				
Address				

Investment Assets & Savings

List any investment assets & savings. Include Employer Retirement Plans, IRA's, Brokerage Accounts, Savings Accounts, Life Insurance etc. Include current account value, if you are contributing, frequency of contribution. If it is a joint owned account, please list it under 1 client not both.

Account Description Include type and where it is held	Client	Co – Client
	$	$
	$	$
	$	$
	$	$
	$	$
	$	$
	$	$
	$	$
	$	$
	$	$
	$	$
	$	$
	$	$

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Other Assets

Please list any other assets (nonfinancial) such as homes, collectibles, investment properties, crypto etc.

Asset Description	Owner	Current Value
		$
		$
		$
		$
		$
		$

Liabilities

Please list any Debt such as mortgages, credit card, medical bills, student loans, car notes, boat note, IRS Taxes etc.

Asset Description	Owner	Amount Remaining	Current Interest Rate	Monthly payment
		$	%	$
		$	%	$
		$	%	$
		$	%	$
		$	%	$
		$	%	$
		$	%	$
		$	%	$
		$	%	$
		$	%	$

Retirement Income Sources

List any pensions, rental income, part-time work, etc. This should be the expected income received at retirement pretax!

Description	Recipient	Amount	Starts	Ends	Inflation Adjustments	Survivor Pension
		$			%	%
		$			%	%
		$			%	%
		$			%	%
		$			%	%
		$			%	%
		$			%	%
		$			%	%
		$			%	%
		$			%	%

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Goals

State your goal as well as the amount you would like to spend in today's dollars…I'll do the rest! Remember P.A.T.

Description of Goal (Purpose)	*Cost in today's dollars (Amount)*	*When will the goal start? (Time)*
	$	
	$	
	$	
	$	
	$	
	$	
	$	
	$	
	$	
	$	
	$	
	$	

Notes & Questions

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