



THE **SANCHEZ** GROUP  
OF

**RAYMOND JAMES**

**Goal Planning Checklist**

<b>Personal Info:</b>	<b>Client</b>	<b>Co-Client</b>
<b>Full Legal Name</b>		
<b>Date of Birth</b>		
<b>Number of Children</b> (Include names & ages)		
<b>Marital Status</b>		
<b>State of Residence</b>		
<b>Employment Status</b>		
<b>Employer</b>		
<b>Job Title</b>		
<b>Email Address</b>		
<b>Phone Number</b>		

<b>Monthly Expenses:</b>	<b>Client</b>	<b>Co-Client</b>
<b>Mortgage/Rent</b>		
<b>Utilities</b>		
<b>Groceries</b>		
<b>Auto Loan &amp; Insurance</b>		
<b>Gas</b>		
<b>Credit Card Payments:</b> (Include Remaining Balance & Interest Rates)		
<b>Health Insurance</b>		
<b>Personal Loans</b>		
<b>Monthly Memberships (Gym, Netflix, Spotify, Etc.)</b>		
<b>Cell Phone Bill</b>		
<b>Travel &amp; Vacations</b>		
<b>Other Miscellaneous</b>		
<b>Total</b>		

<b>Monthly Income:</b>	<b>Client</b>	<b>Co-Client</b>
<b>Salary/ Wages</b>		
<b>Tax-Free Investment Income</b>		
<b>Taxable Investment Income</b>		
<b>Social Security</b>		
<b>Other Income Streams</b>		
<b>Total</b>		

**Please attach the following statements available to you:**

- Investment account statements (outside of Raymond James)
  - Include "Holdings" pages
- Retirement Account Statements (401k, Pensions, etc...)
  - Include "Holdings" pages
    - Life Insurance Statements
  - Social Security Benefit Statements
    - Latest Tax Returns
  - Summary of Employment Benefits
    - Trusts
    - Wills
- Mortgage Statements (Including Vacation Homes or Rental Properties)
  - Current Value of Home (Rough Estimate)