

Information Sheet

| PERSONAL INFORMATION | | |
|----------------------|--------|--------|
| | Client | Spouse |
| Courtesy Title | | |
| First Name | | |
| Last Name | | |
| Birthdate | | |
| Occupation | | |
| Employer | | |
| Street Address | | |
| City | | |
| State | | |
| Zip Code | | |
| Phone | | |
| Email Address | | |

| LIABILITIES | | | | | | | | | | | |
|-------------|-----------------|---|---|---|--------------|----------|-------------|-----------------|---------------------|---|---|
| Description | Liability Type* | | | | Balance (\$) | Rate (%) | Payment(\$) | Min Payment(\$) | Responsible Party** | | |
| | P | M | I | B | | | | | C | S | J |
| | P | M | I | B | | | | | C | S | J |
| | P | M | I | B | | | | | C | S | J |
| | P | M | I | B | | | | | C | S | J |
| | P | M | I | B | | | | | C | S | J |
| | P | M | I | B | | | | | C | S | J |
| | P | M | I | B | | | | | C | S | J |
| | P | M | I | B | | | | | C | S | J |
| | P | M | I | B | | | | | C | S | J |
| | P | M | I | B | | | | | C | S | J |
| | P | M | I | B | | | | | C | S | J |

*Liability types: Personal, Mortgage, Investment, or Business

**Responsible parties: Client, Spouse, or Joint Tenancy

| ADDITIONAL DEBT PAYMENTS | |
|--------------------------|--|
| Extra monthly payment | |
| One-time payment | |
| One-time payment month | |
| One-time payment year | |

| RATE ASSUMPTIONS | |
|------------------------------|---|
| Debt ordering | <input type="checkbox"/> Lowest to Highest Balance <input type="checkbox"/> Highest to Lowest Interest Rate <input type="checkbox"/> Shortest to Longest Payoff Period |
| Before-tax investment return | |