Leslie Global Wealth's Preliminary Fact Finder

Please return to Leslie Global Wealth, LLC located at 205 N. Michigan Avenue, Suite 3912, Chicago, IL 60601 or email to clientservices@leslieglobalwealth.com.

FA: Barry Leslie	Agency: Leslie Global Wealth, LLC	Date:

Client Name:	DOB:	US Citizen: Y ☐ N ☐
Spouse Name:	DOB:	US Citizen: Y ☐ N ☐
Address:	City, State, Zip:	
Home Phone:	Fax:	E-mail:
Client Cell Phone:	Spouse Cell Phone:	

Family Data:

Children	DOB	Marital Status	US Citizen	Spouse	DOB	Marital Status	US Citizen
		S M Sep Div	Y ☐ N ☐			S M Sep Div	Y ☐ N ☐
		S M Sep Div	Y ☐ N ☐			S M Sep Div	Y ☐ N ☐
		S M Sep Div	Y ☐ N ☐			S M Sep Div	Y ☐ N ☐
Grandchildren				Grandchildren			
		S M Sep Div	Y ☐ N ☐			S M Sep Div	Y ☐ N ☐
		S M Sep Div	Y ☐ N ☐			S M Sep Div	Y ☐ N ☐

Property:

Real Estate/ Personal	Current Value	Tax Basis	Pre-Retire Gross Growth	Post-Retire Gross Growth	Owner
	$ 0.00	$ 0.00	0.00%	0.00%	
	$ 0.00	$ 0.00	0.00%	0.00%	
	$ 0.00	$ 0.00	0.00%	0.00%	
	$ 0.00	$ 0.00	0.00%	0.00%	
	$ 0.00	$ 0.00	0.00%	0.00%	

Investments:

Type/Institution Name	Current Value	Tax Basis	Pre-Retire Gross Growth	Post-Retire Gross Growth	Owner
	$ 0.00	$ 0.00	0.00%	0.00%	
	$ 0.00	$ 0.00	0.00%	0.00%	
	$ 0.00	$ 0.00	0.00%	0.00%	
	$ 0.00	$ 0.00	0.00%	0.00%	
	$ 0.00	$ 0.00	0.00%	0.00%	
	$ 0.00	$ 0.00	0.00%	0.00%	
	$ 0.00	$ 0.00	0.00%	0.00%	

Retirement:

Type/ Institution Name	Current Value	Pre-Retire Gross Growth	Post-Retire Gross Growth	Owner	Beneficiary	Employee Contribution	Employer Contribution
	$ 0.00	0.00%	0.00%			$ 0.00	$ 0.00
	$ 0.00	0.00%	0.00%			$ 0.00	$ 0.00
	$ 0.00	0.00%	0.00%			$ 0.00	$ 0.00
	$ 0.00	0.00%	0.00%			$ 0.00	$ 0.00
	$ 0.00	0.00%	0.00%			$ 0.00	$ 0.00

Projections are based on assumptions provided by the advisor/representative, and are not guaranteed. Actual results will vary, perhaps to a significant degree. The projected reports are hypothetical in nature and for illustrative purposes only. Consult your tax and/or legal advisor before implementing any tax or legal strategies.

Business Assets:

Business Name	Base Value	Tax Basis	Pre-Retire Gross Growth	Post-Retire Gross Growth	Owner	Business Type
	$ 0.00	$ 0.00	0.00%	0.00%		
	$ 0.00	$ 0.00	0.00%	0.00%		
	$ 0.00	$ 0.00	0.00%	0.00%		

Insurance:

	Life 1	Life 2
Policy Number		
Institution Name		
Purchase Date		
Policy Type		
Person Insured		
Owner		
Beneficiary		
Death Benefit		
Cash Value	$ 0.00	$ 0.00
Cash Value Growth Rate	0.00%	0.00%
Annual Premium		
Premium Term		
Premium Payer		
Reinvested At		

	Long Term Care	Disability
Policy Number		
Institution Name		
Purchase Date		
Insured		
Benefit Amount		
Owner		
Annual Premium	$ 0.00	$ 0.00
Premium Term		
Premium Payer		
Elimination Period		
Benefit Period		
COLA		

Does your Insurance continue to fill a need?	
Do you work closely with a life insurance agent?	

Liability:

Mortgage/Loans	Institution Name	Current Balance	As of Date	Interest Rate	Loan Term
		$ 0.00		0.00%	
		$ 0.00		0.00%	
		$ 0.00		0.00%	
		$ 0.00		0.00%	

Salary/Bonus and Social Security:

	Annual Amount	Indexed At	Owner	Destination Account	Guaranteed	Starts	Ends
Salary/Bonus	$ 0.00						
Salary/Bonus	$ 0.00						
Social Sec.	$ 0.00						

Expenses:

Current	Semi-Retirement	Retirement	Advanced Years	Desired income in the Event of Death: Client's Death: _________ Spouse's Death: _________
$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00

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