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Securities offered through LPL Financial, Member FINRA/SIPC. Investment advice offered through Private Advisor Group, a registered investment advisor. Kremer & Associates, Inc., and Private Advisor Group are separate entities from LPL Financial.

CONFIDENTIAL WEALTH PLAN WORKSHEET

PERSONAL INFORMATION

	<i>Client 1</i>	<i>Client 2</i>
Legal Name		
Preferred Name		
Date of Birth		
Social Security Number		
Driver's License Number		
	Issue Date <input type="text"/> Exp Date <input type="text"/>	Issue Date <input type="text"/> Exp Date <input type="text"/>
Primary Phone		
Email Address		
Residential Address		
City, State, Zip		

EMPLOYMENT INFORMATION

Occupation and Title	
Employer	
Employer Address	
City, State, Zip	

PERSONAL INCOME STATEMENT

Earned Income	\$	\$
Pension	\$	\$
Social Security	\$	\$
Other Income	\$	\$

PERSONAL BALANCE SHEET

Non-Retirement Assets

Stocks/Bonds/Mutual Funds	\$	\$
Checking/Savings	\$	\$
Other	\$	\$

Retirement Assets

IRAs, Roth IRAs	\$	\$
401(k), 403(b), 457, etc.	\$	\$
Other (Deferred Comp, Annuities)	\$	\$

Liabilities

Mortgage (term/rate/yr acquired)	\$	\$
Auto Loans, Student Loans, etc.	\$	\$
Credit Cards & short-term debt	\$	\$
Other	\$	\$