



A Registered Financial Advisor

**Rosenberg  
Financial  
Group,  
Inc.**

*Retire...  
Relax<sup>®</sup>*

Securities and investment advisory services offered through Royal Alliance Associates, Inc. (RAA), member FINRA/SIPC. RAA is separately owned and other entities and/or marketing names, products or services referenced here are independent of RAA.

# Financial Planning Worksheet

Name:	DOB:
Spouse:	DOB:
Address:	Phone:
	Phone:
E-mail:	
E-mail:	

Amounts in Banks & Credit Unions (Non-Retirement Accounts) (i.e. CD's, Checking, Savings, Money Markets, etc...)		
Where Account is Held	Type Account	Approximate Balance
		\$
		\$
		\$
		\$
		\$
		\$
		\$
Asset Sub Total 1		\$

Mutual Funds & Brokerage Accounts		
Where Account is Held	Type Account	Approximate Balance
		\$
		\$
		\$
		\$
		\$
		\$
		\$
Asset Sub Total 2		\$
Total Assets (1 & 2)		



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