

# BARKO FINANCIAL

Home of the Essential FORMula™

## Section 1: Personal information

Please provide personal information of your family members

Name	Relationship	Date of Birth	Residence State
	Client		
	Co Client		

## Section 2: Financial Goals

When would you like to retire? What are your other financial goals? Funding education, new cars, vacations?

Goal Description	Annual Amount	Starts	Ends	Frequency*
Client's retirement age	-----		-----	-----
Co client's retirement age	-----		-----	-----
Annual retirement expense		Retirement	-----	Every year

FAIRHOPE & MOBILE | ALABAMA

thomas.barko@saswealth.com | barkofinancial.com | 251.517.0207 P | 251.990.2678 F

Securities offered through SA Stone Wealth Management Inc. Member FINRA and SIPC.  
Advisory Services offered through SA Stone Investment Advisors Inc.

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## Section 3: Income, Expenses and Savings

Please input your income information.

Income Description	Annual Amount	Annual Increase	Starts	Ends
Client's Salary			Now	Retirement

Please provide your average living expenses before retirement as well as any other expenses you have.

Expense Description	Monthly Amount	Annual Increase	Starts	Ends
Monthly living expense before retirement			Now	Retirement

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Please include your planned savings such as contributions to 401(k), IRA, 529, etc.

Savings Description	Annual Contribution	Employer Match %	Employer Match up to %	Employer Flat Match %
Client's 401(k) / 403(b) contribution				

## Section 4: Investment Assets, Real Estate and Debt

List your bank and Investment accounts including checking, taxable, 401k account, IRA account, etc.

Account Description	Account types	Balance
Client's employer retirement plan	401k/403(b)	
<b>Estimated asset allocation: _____% in equity, _____% in Bond, and _____% in cash</b>		

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Please include information on credit cards, mortgages, Home equity loans, student loans and other loans.

Debt name	Original Loan Amount	Interest Rate	Loan Term	Monthly Payment	Balance

If you own any real estate property, please provide details below.

Property name	Purchase Year	Purchase Price	Current Value	Annual property tax	Annual insurance
<b>Primary home</b>					

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## Section 5 Insurance Policies:

Include insurance policies such as life insurance, disability insurance or long term care

Policy description	Insured	Benefit amount	Annual premium	Cash value

## Notes