

Goals and Priorities

ON A SCALE OF
1 to 9

1 OF NO IMPORTANCE 2 3 OF LITTLE IMPORTANCE 4 5 FAIRLY IMPORTANT 6 7 VERY IMPORTANT 8 9 EXTREMELY IMPORTANT

PRIORITY BY NUMBER MONEY NEEDED DATE RANGE INCOME NEEDED DATE RANGE

REDUCE DEBT					
BUILD AN EMERGENCY FUND					
INCREASE INSURANCE COVERAGE					
BUY A HOUSE					
MAKE HOME IMPROVEMENT					
BUY A CAR					
MAKE SOME OTHER BIG PURCHASE					
HAVE CHILDREN					
FINANCE CHILDREN'S EDUCATION					
IMPROVE STEWARDSHIP					
TAKE AN EXPENSIVE VACATION					
TAKE AN UNPAID LEAVE FROM WORK					
START A BUSINESS					
TAKE EARLY RETIREMENT					
LIVE WELL AFTER RETIREMENT					
REDUCE TAX LIABILITY					
PROVIDE FOR YOURSELF IN EVENT OF DISABILITY					
MEDICAID • SPENDING DOWN • PRESERVING ASSETS					
PROVIDE FOR FAMILY IN EVENT OF DEATH					
PROVIDE INHERITANCE TO BENEFICIARIES					

Monthly Cash Flow Over The Past Year

Client

Please provide a copy of your current pay stub.

INCOME:	ANNUALLY
EMPLOYER INCOME (W-2)	_____
SELF-EMPLOYED INCOME (1099)	_____
OTHER (FARM, RENTAL, ETC)	_____
GROSS INCOME:	_____
DEDUCTIONS FOR:	ANNUALLY
FEDERAL AND STATE TAXES	_____
SOCIAL SECURITY TAXES	_____
GROUP EMPLOYER BENEFITS	_____
ALIMONY/CHILD SUPPORT	_____

Spouse

Please provide a copy of your current pay stub.

INCOME:	ANNUALLY
EMPLOYER INCOME (W-2)	_____
SELF-EMPLOYED INCOME (1099)	_____
OTHER (FARM, RENTAL, ETC)	_____
GROSS INCOME:	_____
DEDUCTIONS FOR:	ANNUALLY
FEDERAL AND STATE TAXES	_____
SOCIAL SECURITY TAXES	_____
GROUP EMPLOYER BENEFITS	_____
ALIMONY/CHILD SUPPORT	_____

HOW FREQUENTLY DO YOU GET PAID?WEEKLY BI-WEEKLY SEMI-MONTHLY MONTHLY

HOW FREQUENTLY DOES YOUR SPOUSE GET PAID?WEEKLY BI-WEEKLY SEMI-MONTHLY MONTHLY

DOES YOUR EMPLOYER CONTRIBUTE TO YOUR RETIREMENT PLAN?YES NO HOW MUCH? _____

DOES YOUR SPOUSE'S EMPLOYER MATCH YOUR RETIREMENT PLAN CONTRIBUTIONS? ...YES NO HOW MUCH? _____

DO YOU ROUTINELY SAVE TO ANY OTHER ACCOUNTS?YES NO

IF YES, WHERE AND HOW MUCH? _____

DOES YOUR SPOUSE ROUTINELY SAVE TO ANY OTHER ACCOUNTS?YES NO

IF YES, WHERE AND HOW MUCH? _____

Family Expenditures

(Please indicate if paid other than monthly, otherwise we will assume the amount is per month)

CHARITABLE CONTRIBUTIONS

TITHE	_____
MISSIONS	_____
UNIVERSITIES	_____
OTHER	_____

WATER	_____
GAS	_____
SANITATION	_____
CABLE TV	_____
INTERNET	_____
TELEPHONE	_____
YARD/POOL SERVICE	_____
MAINTENANCE	_____
OTHER	_____

HOUSING

MORTGAGE/RENT	_____
PROPERTY TAXES	_____
HOMEOWNERS INSURANCE	_____
ELECTRIC	_____

Family Expenditures (continued)

FOOD & BEVERAGE

GROCERY _____
 CONVENIENCE STORE _____
 OTHER _____

AUTOMOBILES

CAR PAYMENTS _____
 GASOLINE _____
 LUBE/OIL _____
 INSURANCE _____
 LICENSE PLATES _____
 MAINTENANCE _____

INSURANCE

LIFE _____
 MEDICAL _____
 DISABILITY _____
 UMBRELLA _____
 OTHER _____

DEBTS

CREDIT CARDS _____
 VISA/MASTERCARD _____
 AMEX/DISCOVER _____
 NOTES/LOANS _____
 BANKS _____
 FINANCE CO. _____
 OTHER _____

CLOTHING

ADULT _____
 CHILDREN _____

PERSONAL CARE

TOILETRIES _____
 COSMETICS _____
 BEAUTY SHOP / BARBER _____
 DRY CLEANING/LAUNDRY _____
 ALLOWANCE _____
 LUNCHES _____
 OTHER _____

FURNISHING

FURNITURE _____
 APPLIANCES _____
 OTHER _____

MEDICAL EXPENSES

DOCTOR _____
 DENTIST _____
 PRESCRIPTIONS _____
 OTHER _____

EDUCATION/SELF IMPROVEMENT

NEWSPAPER/MAGAZINES _____
 COMPUTER _____
 CHILDREN'S ACTIVITIES _____
 SCHOOL _____
 OTHER _____

ENTERTAINMENT

EATING OUT _____
 WEEKEND TRIPS _____
 BABY-SITTERS _____
 SPORTS _____
 SHOWS _____
 THEATER _____
 MEMBERSHIPS _____
 OTHER _____

VACATIONS & HOLIDAYS

VACATIONS _____
 CHRISTMAS _____
 BIRTHDAYS _____
 SHOWERS _____
 OTHERS _____

MISCELLANEOUS

CHILD CARE _____
 CHILD SUPPORT _____
 PET SUPPLIES _____
 OTHER _____

Investment Assets

(Please complete or provide current financial statement)

Assets

	STATEMENT PROVIDED?	MARKET VALUE	GROWTH RATE	CURRENT LIABILITY	OWNERSHIP
FIXED ASSETS					
CASH & CHECKING	<input type="checkbox"/>	_____	_____	_____	_____
T-BILLS, GOV'T BONDS, MONEY MARKET	<input type="checkbox"/>	_____	_____	_____	_____
SAVINGS ACCOUNTS & CDS	<input type="checkbox"/>	_____	_____	_____	_____
MUNICIPAL BOND FUNDS	<input type="checkbox"/>	_____	_____	_____	_____
CORP. BONDS, INCOME MUTUAL FUNDS	<input type="checkbox"/>	_____	_____	_____	_____
NOTES & MORTGAGE RECEIVABLE	<input type="checkbox"/>	_____	_____	_____	_____
LIFE INSURANCE CASH VALUE - FIXED	<input type="checkbox"/>	_____	_____	_____	_____
FIXED ANNUITIES	<input type="checkbox"/>	_____	_____	_____	_____
IRA, KEOGH, 401k - FIXED	<input type="checkbox"/>	_____	_____	_____	_____
CORPORATE QUALIFIED PLANS - FIXED	<input type="checkbox"/>	_____	_____	_____	_____
OTHER	<input type="checkbox"/>	_____	_____	_____	_____
VARIABLE ASSETS					
RESIDENCE	<input type="checkbox"/>	_____	_____	_____	_____
COMMON OR PREFERRED STOCK	<input type="checkbox"/>	_____	_____	_____	_____
GROWTH MUTUAL FUNDS	<input type="checkbox"/>	_____	_____	_____	_____
BALANCED MUTUAL FUNDS	<input type="checkbox"/>	_____	_____	_____	_____
LIFE INSURANCE CASH VALUE - VARIABLE	<input type="checkbox"/>	_____	_____	_____	_____
VARIABLE ANNUITIES	<input type="checkbox"/>	_____	_____	_____	_____
INCOME REAL PROPERTY	<input type="checkbox"/>	_____	_____	_____	_____
UNDEVELOPED LAND	<input type="checkbox"/>	_____	_____	_____	_____
REAL ESTATE LIMITED PARTNERSHIPS	<input type="checkbox"/>	_____	_____	_____	_____
ENERGY EXPLORATION PARTNERSHIPS	<input type="checkbox"/>	_____	_____	_____	_____
EQUIPMENT LEASING PARTNERSHIPS	<input type="checkbox"/>	_____	_____	_____	_____
BUSINESS INTEREST	<input type="checkbox"/>	_____	_____	_____	_____
AGRICULTURE & RANCHING	<input type="checkbox"/>	_____	_____	_____	_____
ART, ANTIQUES, STAMPS, & GEMS	<input type="checkbox"/>	_____	_____	_____	_____
GOLD, SILVER, & COINS	<input type="checkbox"/>	_____	_____	_____	_____
COMMODITIES / OPTIONS	<input type="checkbox"/>	_____	_____	_____	_____
IRA, KEOGH, TSA, 401k - VARIABLE	<input type="checkbox"/>	_____	_____	_____	_____
CORPORATE QUALIFIED PLANS - VARIABLE	<input type="checkbox"/>	_____	_____	_____	_____
OTHER VARIABLE ASSETS	<input type="checkbox"/>	_____	_____	_____	_____
PERSONAL ASSETS					
PERSONAL PROPERTY	<input type="checkbox"/>	_____	_____	_____	_____
AUTOMOBILES	<input type="checkbox"/>	_____	_____	_____	_____
RECREATIONAL PROPERTY	<input type="checkbox"/>	_____	_____	_____	_____
OTHER	<input type="checkbox"/>	_____	_____	_____	_____

Debt Information

Secured Liabilities

	STATEMENT PROVIDED?	LENDER	ORIGINAL AMOUNT	OUTSTANDING BALANCE	TERM OF LOAN	INTEREST RATE %	CURRENT PAYMENT
HOME MORTGAGE	<input type="checkbox"/>	_____	_____	_____	_____	_____	_____
SECOND MORTGAGE	<input type="checkbox"/>	_____	_____	_____	_____	_____	_____
OTHER INVESTMENTS	<input type="checkbox"/>	_____	_____	_____	_____	_____	_____
OTHER INVESTMENTS	<input type="checkbox"/>	_____	_____	_____	_____	_____	_____
OTHER INVESTMENTS	<input type="checkbox"/>	_____	_____	_____	_____	_____	_____
HOME EQUITY LINE	<input type="checkbox"/>	_____	_____	_____	_____	_____	_____
AUTOMOBILE LOAN	<input type="checkbox"/>	_____	_____	_____	_____	_____	_____
AUTOMOBILE LOAN	<input type="checkbox"/>	_____	_____	_____	_____	_____	_____
BOAT LOAN	<input type="checkbox"/>	_____	_____	_____	_____	_____	_____
OTHER LOAN	<input type="checkbox"/>	_____	_____	_____	_____	_____	_____

Unsecured Liabilities

	STATEMENT PROVIDED?	LENDER	OUTSTANDING BALANCE	MONTHLY PAYMENT	INTEREST RATE %	CREDIT LIMIT
BANK CREDIT LINE	<input type="checkbox"/>	_____	_____	_____	_____	_____
OVERDRAFT CHECKING	<input type="checkbox"/>	_____	_____	_____	_____	_____
PERSONAL LOANS	<input type="checkbox"/>	_____	_____	_____	_____	_____
	<input type="checkbox"/>	_____	_____	_____	_____	_____
	<input type="checkbox"/>	_____	_____	_____	_____	_____
CREDIT CARDS	<input type="checkbox"/>	_____	_____	_____	_____	_____
	<input type="checkbox"/>	_____	_____	_____	_____	_____
	<input type="checkbox"/>	_____	_____	_____	_____	_____
	<input type="checkbox"/>	_____	_____	_____	_____	_____

If possible, it would be helpful to have a copy of the loan papers on any home mortgage loans, so that we can accurately calculate payoff terms, dates and pre-payment options.

OUR MISSION

creative financial centre® is a financial service center dedicated to providing individuals, families, businesses, and organizations with quality financial products and/or services for the achievement of their goals and objectives through a network of associates committed to serving clients in a Christ-like manner by assisting them in development of stewardship in their lives believing that “it profits a man nothing to gain the whole world and lose his soul”.

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***“Great plans do not happen by chance...
They result from creative designs.”***

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