SOLID FINANCIAL PLAN
Protecting Family Building Legacy

IUL & ANNUITY

CLIENT INVENTORY SHEET

Client Name: ______________________________ DOB *(mm/dd/yy)*: ________________

Client Email: ____

Client Cell: __________________________ Gender: _________ State: ___________

IUL **Desired Monthly Premium:** ____________________ **Pay Until What Age:** ____________

What are their goals: ◇ Lifetime Income ◇ Pass onto Spouse ◇ Tax Deferral

◇ Pass Onto Children ◇ Tax Free Retirement ◇ Final Expense ◇ Payoff Mortgage

◇ Replace Income ◇ Cash Accumulation ◇ Death Benefit

Additional Comments: ____

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ANNUITY **Proposed Annuity Amount: $**_________________

Spouse Name: ____________________________ Spouse DOB *(mm/dd/yy)*: ____________

Is this amount coming from active employment sponsored plan (Y/N): ____

Where is the money coming from? ◇ Traditional IRA ◇ Roth IRA ◇ 401K ◇ Pension
◇ Non-spousal inherited IRA ◇ 403B ◇ TSA ◇ 457 Plan ◇ Checking/Savings
◇ Sale of Home/Business ◇ Qualified Annuity ◇ Money Market ◇ Non-qualified Annuity
◇ NQ Brokerage Account ◇ TSP

What is your client primary goal(s):
◇ Safe growth with best possible returns ◇ Immediate lifetime income
◇ Income replacement for their spouse only ◇ Income replacement for myself if my spouse passes
◇ Leaving the most amount money possible as legacy
◇ Interested in lifetime income in: ______ 1-6 years _______ 7 to 9 years ______ 10+ years

Is the client currently taking withdrawals from this account? If so, how much? ____________________

If not taking withdraws/income at what age does the client anticipate taking withdraws/income? *If not planning on taking write "n/a": ___________

Additional comments: ____

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