

Pyramid of Financial Independence

The purpose of this document is to gather information about your existing financial profile. This pyramid supplements a more complete fact finder that your financial professional will complete with you.



<p>High Risk</p> <p>Futures: \$ _____ Commodities: \$ _____ Precious metals and rare coins: \$ _____ Options: \$ _____ Limited partnerships: \$ _____ Raw land: \$ _____</p>		
<p>Aggressive</p> <p>Aggressive growth stocks and mutual funds: \$ _____ _____ International stocks and mutual funds: \$ _____ _____ High yield (junk) bonds and mutual funds: \$ _____ _____ Variable annuities—aggressive growth and international choices: \$ _____ _____</p>		
<p>Growth & Value</p> <p>Growth mutual funds: \$ _____ _____ Growth stocks: \$ _____ _____ Variable annuities—growth choices: \$ _____ _____</p>	<p>Income</p> <p>Income mutual funds: \$ _____ Individual bonds: \$ _____ Income stocks: \$ _____ Variable annuities—income choices: \$ _____ Investment real estate: \$ _____</p>	
<p>Emergency Cash Reserve</p> <p>Liquid Account (approx. 3-6 months expenses) Interest-bearing checking account: \$ _____ _____ T-bills: \$ _____ _____ Bank or C.U. savings account: \$ _____ _____ Money market account: \$ _____ _____</p>	<p>Foundation Savings</p> <p>TSA fixed account balance: \$ _____ CDs & IRAs in CDs: \$ _____ US Series EE savings bonds: \$ _____ Cash-value of whole life insurance: \$ _____ _____ Pension plan (401(a), 401(k)) fixed account balance: \$ _____ _____</p>	<p>Risk Management</p> <p>Will: \$ _____ _____ Disability income insurance: \$ _____ Long-term care insurance: \$ _____ Life insurance: \$ _____ Homeowner/renter insurance: \$ _____ Liability insurance: \$ _____ Auto insurance: \$ _____</p>

Are you (or your spouse) getting a raise? Yes No Amount \$: _____

Do you have any bills that will be paid off soon? Yes No Amount \$: _____

Did you get a tax refund last year? Yes No Amount \$: _____

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The information above was provided by the client and is assumed to be accurate.

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