

DATA COLLECTION FORM

CHURCH INFORMATION:						
Church:						
Phone:			Email:			
Name:					Birthdate:	
Desired Retirement Age:					Gender: Male	Female
Spouse/Other Name:		_			Birthdate:	
Desired Retirement Age:				_	Gender: 🗌 Male 🗌	Female
Number of Children: Ages:					Resident State:	
CURRENT CONCERNS:						
Controlling Spending			Cre	ating your	own Family Bank	
Eliminating Debt			U Will	s/Trust		
Reducing Taxes			Ass	et Protectio	on	
Providing for children's or gra	andchildren's educ	cation	Est	ate Plannin	g	
Maximizing Savings			Oth	er:		
FUTURE EXPENDITURES:						
FUTURE EXPENDITURES:						
REAL ESTATE:	Personal	Residence	ce Inform	nation:		
	Personal	Resident	ce Inform	nation:		
REAL ESTATE:		Residenc n Remainin		nation: years	Interest Rate:	%
REAL ESTATE: Mortgage Payment (P&I only):	Tern	n Remainii			Interest Rate:	%
REAL ESTATE: Mortgage Payment (P&I only): Outstanding Mortgage:	Tern	n Remainii term)	ng:	years		% st Only
REAL ESTATE: Mortgage Payment (P&I only): Outstanding Mortgage:	Tern	n Remainii term) Fi	ng: ixed Tern	years	15 year, etc.	
REAL ESTATE: Mortgage Payment (P&I only): Outstanding Mortgage:	Term & circle applicable	n Remainii term) Fi	ng: ixed Tern RM (5 yr,	years n (30 year, , 7 yr, 10 yr,	15 year, etc.	
REAL ESTATE: Mortgage Payment (P&I only): Outstanding Mortgage:	Term & circle applicable	n Remainii term) Fi Al	ng: ixed Tern RM (5 yr,	years n (30 year, , 7 yr, 10 yr,	15 year, etc.	
REAL ESTATE: Mortgage Payment (P&I only): Outstanding Mortgage: Type of Mortgage: (check one &	Term & circle applicable Other	n Remainii term) Fi Al	ng: ixed Tern RM (5 yr, Owned	years n (30 year, , 7 yr, 10 yr,	15 year, etc.	
REAL ESTATE: Mortgage Payment (P&I only): Outstanding Mortgage: Type of Mortgage: (check one & Mortgage Payment (P&I only):	Circle applicable	n Remainin term) D Fi D Al Property	ng: ixed Tern RM (5 yr, Owned	years n (30 year, , 7 yr, 10 yr,	15 year, etc. Interes	st Only
REAL ESTATE: Mortgage Payment (P&I only): Outstanding Mortgage: Type of Mortgage: (check one & Mortgage Payment (P&I only): Outstanding Mortgage:	Circle applicable	n Remainin term) Fi Al Property n Remainin term)	ng: ixed Tern RM (5 yr, Owned ng:	years n (30 year, , 7 yr, 10 yr, ; years	15 year, etc. Interes etc.)	st Only





DEBT RELATED:

Please list any outstanding debts other than mortgages

Name	Amount Owed	Interest Rate	Minimum Payment	Actual Payment

INSURANCE:

	Primary Insurance	e .				
Yearly Premium:	Death Benefit:	Cash Value:				
Other Insurance						
Premium:	Death Benefit:	Cash Value:				

	Spouse / Partner Insu	irance				
Yearly Premium:	Death Benefit:	Cash Value:				
Other Insurance						
Premium:	Death Benefit:	Cash Value:				



Yes

□ No

INCOME & EXPENSES:

Monthly Gross Income	Primary	Partner
Wages/Salary	\$	\$
Social Security	\$	\$
Pension	\$	\$
Investment Income	\$	\$
Rental Income	\$	\$
Other Income	\$	\$
Total Income	\$	\$
Desired Retirement Income	\$	\$

Do you expect a significant change in cash flow in the near future?



INVESTMENT ACCOUNTS: NON-QUALIFIED ACCOUNTS, QUALIFIED ACCOUNTS, SAVINGS ACCOUNTS List account type IRA, Roth, 401K, 403b, 457, Savings, etc. Check the box if the account value, contributions, or both are available

Financial Institution	Account Type	Account Value	Available?	Monthly Contribution	Available?
		\$			
		\$			
		\$			
		\$			
		\$			
		\$			
		\$			
		\$			
		\$			
		\$			

ACCELERATOR PAYMENT:

Please estimate the amount that could be allocated from your current spending without significantly impacting your essential expenses. If you are unable to allocate any discretionary payment at this time, we recommend working with a spending planner and budget to identify potential funds for accelerating debt paydown in the future.