

Financial Client Questionnaire

Wealth Legacy Group[®], Inc.

Today's Date: _____

	Husband	Wife	Joint
Annual Income – Earned <i>(Salary, commissions, bonuses, etc.)</i>			
Annual Income – Unearned <i>(Interest, dividends, pensions, rental income, annuity, social security payments)</i>			

Notes:

Current Assets

Please provide a copy of your most recent statements

	Husband	Wife	Joint
Cash and Cash Equivalents			
Notes, Accts Receivables, Mortgages			
Stocks and Mutual Funds			
Bonds			
Business Interests			
Real Estate			
Life Insurance Face Amounts			
Retirement Plans			
Personal Effects			
Other			
TOTAL ASSETS:			

Notes:

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Current Liabilities

	Husband	Wife	Joint
Mortgages			
Notes to Financial Institutions			
Loans on Life Insurance Policies			
Tax Liabilities			
Other Obligations			
TOTAL LIABILITIES:			

Notes:

NET WORTH (Assets - Liabilities)

	Husband	Wife	Joint
Net Worth (Assets – Liabilities)			

Notes:
