NC Financial Group

Getting Started

Date: 8/4/22

Client Name:

Address:

Phone:

Email:

Notes:

Investments

Date Discussed | Have On File | Discuss Later ( ) | Do Not Wish to Discuss | Other

Updated Risk Tolerance |

Long Term Investments |

Emergency Fund |

Savings Account Statements |

Collectibles |

401(k)/Retirement Plan |

Education Accounts |

Child 1 |

Child 2 |

NOTES:

Tax/Accounting

Date Discussed | Have On File | Discuss Later (   ) | Do Not Wish to Discuss | Other

Personal Income Tax |

Business Tax Return |

Other Accounting |

Estimated Payments |

Retirement Income

Date Discussed | Have On File | Discuss Later (   ) | Do Not Wish to Discuss | Other

Social Security Income |

Pension Income |

Annuity Statements |

Retirement Income Needs Analysis |

Notes |

Insurance

Date Discussed | Have On File | Discuss Later (10/1/22 **) | Do Not Wish to Discuss | Other**

Life Insurance |

Long Term Care |

Disability Income |

Auto(s) |

Homeowners / Renters |

Specialty - RV/Boat, etc. |

Annuity Review |

Estate Planning

Date Discussed | Have On File | Discuss Later (10/19/22) **| Do Not Wish to Discuss | Other**

Trust |

Living Will |

Power of Attorney |

Beneficiary Review |

Notes |

Debts

Date Discussed | Have On File | Discuss Later ( ) **| Do Not Wish to Discuss | Other**

Mortgage |

Credit Card |

Student Loans |

Other |

Notes |

Other Items

Date Discussed | Have On File | Discuss Later ( ) **| Do Not Wish to Discuss | Other**

Value Discussion |

Introductions/Referrals |

5-Year Forecast |

10-Year Forecast |

Needs & Wishes |

Notes |