

Portfolio Investment Review Worksheet

This worksheet helps centralize information about your cash, savings and investments, so that our investment specialist can help analyze and identify strengths and opportunities for you going forward.

Your Contact Info:

First Name: _____

Last Name: _____

Address: _____

City: _____

State/Zip: _____

Phone (work): _____

Phone (home): _____

Email: _____

Indicate the products you currently use	Total your current balances	Estimate the amount of anticipated annual contributions	Type of account (401k, IRA, Trust, Investment Management)	Indicate what percent of your retirement nest egg this represents
CDs	\$	\$		<input type="checkbox"/> less than 25% <input type="checkbox"/> 25-50% <input type="checkbox"/> over 50%
Annuities	\$	\$		<input type="checkbox"/> less than 25% <input type="checkbox"/> 25-50% <input type="checkbox"/> over 50%
Stocks	\$	\$		<input type="checkbox"/> less than 25% <input type="checkbox"/> 25-50% <input type="checkbox"/> over 50%
Bonds	\$	\$		<input type="checkbox"/> less than 25% <input type="checkbox"/> 25-50% <input type="checkbox"/> over 50%
Mutual Funds	\$	\$		<input type="checkbox"/> less than 25% <input type="checkbox"/> 25-50% <input type="checkbox"/> over 50%
Life Insurance Term <input type="checkbox"/> Whole <input type="checkbox"/> Variable <input type="checkbox"/> Universal <input type="checkbox"/>	\$ (cash value)	\$ (premiums)		<input type="checkbox"/> less than 25% <input type="checkbox"/> 25-50% <input type="checkbox"/> over 50%
Cash Balance Checking	\$	\$		<input type="checkbox"/> less than 25% <input type="checkbox"/> 25-50% <input type="checkbox"/> over 50%
Cash Balance Savings	\$	\$		<input type="checkbox"/> less than 25% <input type="checkbox"/> 25-50% <input type="checkbox"/> over 50%

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