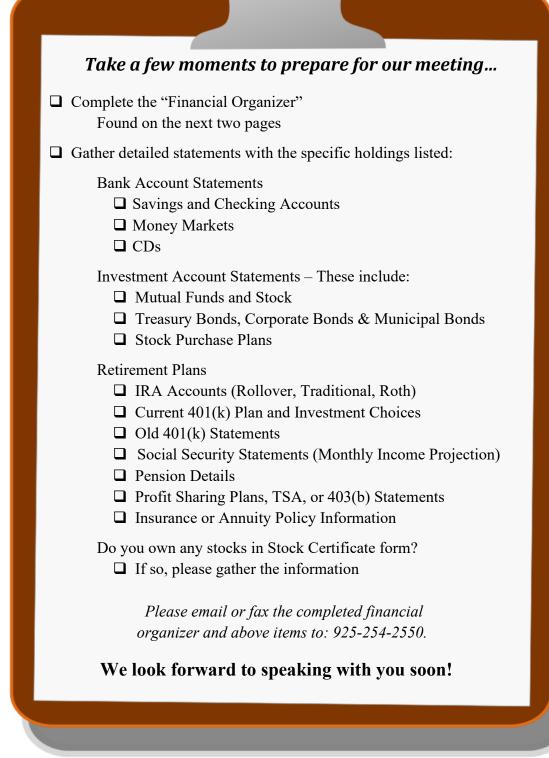
## **PREPARING FOR YOUR MEETING**



## **FINANCIAL ORGANIZER**

Date \_\_\_\_\_

Please be sure to include your detailed account statements.

<b>My Information</b>	SPOUSE/PARTNER/OTHER		
Name	Name		
Address	Address		
Cell Phone	Cell Phone		
Home Phone	Home Phone		
Work Phone	Work Phone		
Home/Work Fax	Home/Work Fax		
Email	Email		
Social Security Number	Social Security Number		
Your Date of Birth	Your Date of Birth		
U.S. Citizen 🛛 Yes 🖵 No	U.S. Citizen 🛛 Yes 🗋 No		
Marital Status Dependents	Marital Status Dependents		
Employer's Name	Employer's Name		
Employer's Address	Employer's Address		
Job Title	Job Title		
Employed Since (Year)	Employed Since (Year)		
Stock Market Experience (List the year you started)	Stock Market Experience (List the <i>year</i> you started)		
Stocks Bonds Options	Stocks Bonds Options		
CHILDREN  Date of    1.	of Birth If under 18, list SSN		
Any relations financially dependent upon you (i.e. pare	ents, grandparents, etc.)?		
FINANCIAL OBJECTIVES – Your goals or are	eas of concern		
□ Increased Income Now □ Retirement	nt Income 📮 Income Tax Reduction		
□ Build College Funds □ Build Net	t Worth 🖵 Other		
Your Biggest Fear or Concern:			
Additional Comments:			
Real Estate			
Present Value of Home  \$    Mortgage Balance Due  \$    Equity in Home (Value less Mortgage)  \$	Other Real Estate\$Mortgage Balance Due\$Equity in Home (Value less Mortgage)\$		
Type of Mortgage Current Interest Rate	Type of Mortgage Current Interest Rate		

	red. Retired since:		Ia	h Title		
			Job Title e \$a month toward retirement.			
Sources Of Retirement Income (If Applicable)						
Social Pensio Other	Security \$ n \$ \$	/Month /Month /Month	Spouse/Part		_/Month _/Month _/Month	
Annual Earned Income  \$    Annual Spouse/Partner's Earned Income  \$    Other Income:  Taxable Investment Income    Taxable Investment Income  \$    Non-Taxable Income  \$						
Estate Info		e a Will? e a Trust?	□ Self □ Spouse □ Self □ Spouse			
Company	Ty	pe	Face Amount	Cash Value	Annual Premium 	
Addr	ess			Phone #		
	ess			Phone #		
DEBTS	Type of Loan		Amount Owed	Interest	Rate	
4	Contraction					

**ADDITIONAL COMMENTS/NOTES** 

Thank you for taking the time to fill in this confidential financial worksheet. Keep a copy for your own records and update it regularly.

## THE BACH GROUP AT MORGAN STANLEY

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