Financial Information Sheet

The Daniel Plan

Worksheet

Banking:

- Bank Name:
- Account #:
- Title:
- Beneficiary:
- Advisor Info:

- Account Type:

☐ checking
☐ savings
☐ CD

Brokerage:

- Firm Name:
- Account #:
- Title:
- Beneficiary:
- Advisor Info:

- Account Type:

☐ roth ira
☐ trad ira
☐ individual brokerage
☐ living trust
☐ irrevocable trust
☐ 529

Life Insurance:

- Company Name:
- Policy #:
- Cash Value:
- Premium $:
- Premium Payment:
- Advisor Info:

- Policy Type:

☐ fixed
☐ indexed
☐ variable
☐ universal life
☐ whole life
☐ 2nd to die
☐ term

Financial Information Sheet

The Daniel Plan

Property / Casualty Insurance:

- Company Name:
- Policy #:
- Insurance Coverage:
- Premium $:
- Premium Payment Source:
- Advisor Info:

Debt / Mortgage / Liabilities:

- Company Name:
- Account #:
- Payment Amount:
- Payment Info:
- Asset Secured:
- Type of Debt:
  - ☐ Equity Line
  - ☐ Mortgage
  - ☐ Personal Loan

Company Retirement Information:

- Company Name:
- Account Type:
  - ☐ Roth
  - ☐ Traditional
  - ☐ Pension

Financial Information Sheet

The Daniel Plan

Worksheet

Banking:

- Bank Name:
- Account #:
- Title:
- Beneficiary:
- Advisor Info:

- Account Type:

☐ checking
☐ savings
☐ CD

Brokerage:

- Firm Name:
- Account #:
- Title:
- Beneficiary:
- Advisor Info:

- Account Type:

☐ roth ira
☐ trad ira
☐ individual brokerage
☐ living trust
☐ irrevocable trust
☐ 529

Life Insurance:

- Company Name:
- Policy #:
- Cash Value:
- Premium $:
- Premium Payment:
- Advisor Info:

- Policy Type:

☐ fixed
☐ indexed
☐ variable
☐ universal life
☐ whole life
☐ 2nd to die
☐ term

Financial Information Sheet

The Daniel Plan

Property / Casualty Insurance:

- Company Name:
- Policy #:
- Insurance Coverage:
- Premium $:
- Premium Payment Source:
- Advisor Info:

Debt / Mortgage / Liabilities:

- Company Name:
- Account #:
- Payment Amount:
- Payment Info:
- Asset Secured:
- Type of Debt:
  - ☐ Equity Line
  - ☐ Mortgage
  - ☐ Personal Loan

Company Retirement Information:

- Company Name:
- Account Type:
  - ☐ Roth
  - ☐ Traditional
  - ☐ Pension

Financial Information Sheet

The Daniel Plan

Worksheet

Banking:

- Bank Name:
- Account #:
- Title:
- Beneficiary:
- Advisor Info:

- Account Type:

☐ checking
☐ savings
☐ CD

Brokerage:

- Firm Name:
- Account #:
- Title:
- Beneficiary:
- Advisor Info:

- Account Type:

☐ roth ira
☐ trad ira
☐ individual brokerage
☐ living trust
☐ irrevocable trust
☐ 529

Life Insurance:

- Company Name:
- Policy #:
- Cash Value:
- Premium $:
- Premium Payment:
- Advisor Info:

- Policy Type:

☐ fixed
☐ indexed
☐ variable
☐ universal life
☐ whole life
☐ 2nd to die
☐ term

Financial Information Sheet

The Daniel Plan

Property / Casualty Insurance:

- Company Name:
- Policy #:
- Insurance Coverage:
- Premium $:
- Premium Payment Source:
- Advisor Info:

Debt / Mortgage / Liabilities:

- Company Name:
- Account #:
- Payment Amount:
- Payment Info:
- Asset Secured:
- Type of Debt:
  - ☐ Equity Line
  - ☐ Mortgage
  - ☐ Personal Loan

Company Retirement Information:

- Company Name:
- Account Type:
  - ☐ Roth
  - ☐ Traditional
  - ☐ Pension

Additional Information

The Daniel Plan