

Financial Information Sheet

The
Daniel
Plan

Banking:

- Bank Name:
 - Account #:
 - Title:
 - Beneficiary:
 - Advisor Info:
- Account Type:
 - checking
 - savings
 - CD

Worksheet

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 - Account #:
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 - checking
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 - CD

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Brokerage:

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

- Account Type:
 - roth ira
 - trad ira
 - individual brokerage
 - living trust
 - irrevocable trust
 - 529

Worksheet

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Financial Information Sheet

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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

Worksheet

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Financial Information Sheet



Property / Casualty Insurance:

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

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Financial Information Sheet

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Debt/Mortgage/Liabilities:

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

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Company Retirement:

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

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Additional Information

A decorative graphic in the top right corner consisting of a grid of hexagons. The central hexagon is white and contains the text 'The Daniel Plan'. The surrounding hexagons are light blue and some have lines extending from their vertices, creating a honeycomb-like structure.

The
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