

Personal Information

The
Daniel
Plan

Worksheet

NAME

SOCIAL SECURITY #

DATE OF BIRTH

ADDRESS

CELL PHONE

MOTHERS MAIDEN NAME

EMAIL ADDRESS

BIRTHPLACE

NAME

SOCIAL SECURITY #

DATE OF BIRTH

ADDRESS

CELL PHONE

MOTHERS MAIDEN NAME

EMAIL ADDRESS

BIRTHPLACE

Advisors' Information

The
Daniel
Plan

Worksheet

Attorney:

- Name:
- Phone:
- Email Address:

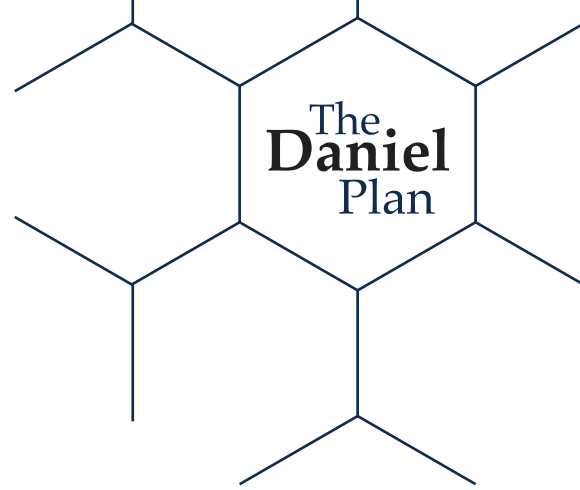
CPA:

- Name:
- Phone:
- Email Address:

Financial Advisor:

- Name:
- Phone:
- Email Address:

Advisors' Information



Insurance Agent:

- Name:
- Phone:
- Email Address:

Successor Trustee:

- Name:
- Phone:
- Email Address

Other:



Financial Information Sheet

The
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Plan

Banking:

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

- Account Type:
checking
savings
CD

Worksheet

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
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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:

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

Digital Life

The
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Plan

Social Media:

- Platform:
- Username:
- Password:

Social Media:

- Platform:
- Username:
- Password:

Worksheet

Daily Life Information:

- Streaming services
 - o Username:
 - o Password:
 - o Payment Information:
- Memberships
 - o Company Name:
 - o Dues:
 - o Payment Information:

Utilities:

- Cable
 - o Username:
 - o Password:
 - o Payment Information:

Digital Life

The logo for 'The Daniel Plan' is located in the top right corner. It features a stylized hexagonal grid pattern. The text 'The Daniel Plan' is centered within one of the hexagons. 'The' is in a small, light blue font, 'Daniel' is in a large, bold, dark blue font, and 'Plan' is in a medium-sized, dark blue font.

The
Daniel
Plan

- Internet
 - o Username:
 - o Password:
 - o Payment Information:

- Cell Phone
 - o Username:
 - o Password:
 - o Payment Information:

- Water
 - o Username:
 - o Password:
 - o Payment Information:

- Electric
 - o Username:
 - o Password:
 - o Payment Information:

- Gas
 - o Username:
 - o Password:
 - o Payment Information:

Digital Life

The logo for 'The Daniel Plan' is located in the top right corner. It features a stylized hexagonal grid pattern. The text 'The Daniel Plan' is centered within one of the hexagons. 'The' is in a small, light blue font, 'Daniel' is in a large, bold, dark blue font, and 'Plan' is in a medium-sized, dark blue font.

The
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- Solar
 - o Username:
 - o Password:
 - o Payment Information:

- Gardner
 - o Name:
 - o Contact Info:

- Pool
 - o Name:
 - o Contact Info:

- Handyman
 - o Name:
 - o Contact Info:

Other Assets

The
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Real Estate:

- Property Address:

Private Investments:

- Investment Name:
- Title:
- Commitment Amount:
- Holding Period:
- Remaining Capital Calls:
- Advisor Info or Contact information:

Personal Items:

- Type:
- Value:
- Safe Keeping Location:
- Safe Deposit Box:
 - Titling:
 - Location:

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
Daniel
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