LUCE AND ASSOCIATES

Ron M. Luce, CFP®
Certified Financial Planner™ professional

Planning Worksheet

Name: Review Date:

Annual Income Update

		Total(s)
Client	$	
Spouse	$	
Other 1 (source)	$	
Other 2 (source)	$	$

Current Assets Update

Cash Reserves	$	
CD's, Money Markets, mutual Funds, etc	$	
IRA Tax-Deferred Account(s)	$	
Employer Retirement Plan(s)/401k, 403b	$	
Other Assets (home, property, etc)	$	$

Current Liabilities Update

Primary Mortgage	$	
Home Equity Loan or Credit Line	$	
Vehicle Loan	$	
Other Debt (credit card, personal, etc)	$	$

Net Worth Update (Total Assets – Total Liabilities) $

Goals Update

1. Is there a specific area(s) of your planning that you would like to discuss during your review?

   ☐ Financial Position (cash flow, cash reserves)
   ☐ Retirement Planning (progress update)
   ☐ Protection (health, life, disability, LTC)
   ☐ Portfolio Asset Allocation
   ☐ Income Tax Planning
   ☐ Estate Planning

2. Have there been any notable changes to your personal financial planning situation?

   ☐ Yes ______________________ ☐ No

3. Other issues of interest or short term needs which will affect your planning?

   ☐ Yes ______________________ ☐ No

131 S. Mechanic • Jackson, MI 49201
(517) 787-8810 Office • (866) 978-7400 Toll Free • (866) 331-3427 Facsimile