

Plan for today, tomorrow and the future

My Financial Profile

Today's date _____

**Required for publishing preliminary goal status*

Client name* _____	Birth date* _____	Pronouns _____
Co-client name* _____	Birth date* _____	Pronouns _____
Children's names _____	Birth date _____	
_____	Birth date _____	
_____	Birth date _____	

What are your goals?

My retirement goal*

_____	By when (mo/yr)?	Goal amount (today's \$)
	<input type="text"/>	\$ <input type="text"/>

My other goals (e.g., education, home improvements, vacation home, travel)

Goal 1 _____	<input type="text"/>	\$ <input type="text"/>
Goal 2 _____	<input type="text"/>	\$ <input type="text"/>
Goal 3 _____	<input type="text"/>	\$ <input type="text"/>

What are your assets and liabilities?

My assets

	Current value	Annual contributions/savings
401(k)(s), 403(b)(s)*	\$ <input type="text"/>	\$ <input type="text"/>
Traditional IRAs, SEPs and SIMPLE IRAs*	\$ <input type="text"/>	\$ <input type="text"/>
Annuities	\$ <input type="text"/>	\$ <input type="text"/>
Brokerage/investment accounts*	\$ <input type="text"/>	\$ <input type="text"/>
Cash/bank accounts*	\$ <input type="text"/>	\$ <input type="text"/>
Roth IRAs, Roth 401(k)(s)*	\$ <input type="text"/>	\$ <input type="text"/>
Cash-value life insurance	\$ <input type="text"/>	\$ <input type="text"/>
Education savings accounts (e.g., 529 plan)	\$ <input type="text"/>	\$ <input type="text"/>
Other assets* (e.g., house, personal property)	\$ <input type="text"/>	\$ <input type="text"/>

Employer contributions

\$ <input type="text"/>	or ___ % of salary (client)
\$ <input type="text"/>	or ___ % of salary (co-client)

My liabilities

	Balance	Monthly payment
Mortgage(s)	\$ <input type="text"/>	\$ <input type="text"/>
Credit card(s)	\$ <input type="text"/>	\$ <input type="text"/>
Other loans (e.g., car, boat)	\$ <input type="text"/>	\$ <input type="text"/>
Other liabilities	\$ <input type="text"/>	\$ <input type="text"/>
	\$ <input type="text"/>	\$ <input type="text"/>

TOTAL	\$ <input type="text"/>	Estimated net worth	\$ <input type="text"/>
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What are your estimated income and expenses?

My annual income today

	Client	Co-client
Salary/bonuses/self-employment* (Income is required if employed)	\$ <input type="text"/>	\$ <input type="text"/>
Social Security** (Consult your annual Social Security Estimate or visit www.ssa.gov/estimator)	\$ <input type="text"/>	\$ <input type="text"/>
Pension income*	\$ <input type="text"/>	\$ <input type="text"/>
Other (e.g., rental, part-time work)	\$ <input type="text"/>	\$ <input type="text"/>

**If you are retired, include your retirement income from these sources.

My annual expenses today

Essential expenses \$ <input type="text"/>	Lifestyle expenses \$ <input type="text"/>
(e.g., mortgage, rent, food, utilities, medical, liability payments)	(e.g., hobbies, entertainment, travel)

Do you anticipate your future expenses to: increase decrease stay the same unsure

How are you insured today?

Client	Co-client
Life insurance death benefit \$ <input type="text"/>	Life insurance death benefit \$ <input type="text"/>
Long-term care daily benefit \$ <input type="text"/>	Long-term care daily benefit \$ <input type="text"/>
Disability insurance benefit \$ <input type="text"/>	Disability insurance benefit \$ <input type="text"/>
or ___ % of salary (if group coverage)	or ___ % of salary (if group coverage)

What to bring to your conversation with your advisor

- Financial statements:** Retirement plans, 401(k)(s), 403(b)(s), brokerage, IRAs, Social Security statements
- Insurance policies:** Life, disability, long-term care, auto & home, umbrella
- Recent tax return**
- Recent pay stub** (if applicable)
- Basic estate documents:** Will, healthcare directive/living will, power of attorney, trust(s)
- Employer benefits information:** Enrollment confirmation and/or benefits summary/handbook

For Ameriprise clients: You can send this form and supporting information securely online. Log in to the secure site on ameriprise.com, upload this and other files in the Documents section and share with your advisor. Not registered? Visit ameriprise.com/register.

If you are not an Ameriprise client: You can either print your completed form and bring it to your next advisor meeting or ask an advisor to invite you to securely share documents on the Ameriprise guest secure site.

Data gathering is one part of the financial planning process. The financial advisor may provide retirement planning analysis and/or recommendations.

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