McCabe Wealth Management

BuildMyProfile™ Advisor

Today's Date: ____________ Unio Contact #: ________________________________

How did you hear about us? ☐ Book ☐ Branch ☐ Rep Activity ☐ SEG/COI ☐ FI Marketing ☐ Other __________

How did you hear about me? ____

What do you want to accomplish during our meeting today? ____

☐ Riskalyze Score: RISK [ ] Investment Objective [ ] Technology Tools: ☐ Clear1 ☐ Albridge ☐ Financial Planning ☐ Marketing Platform ☐ Other __________

Preferred method contact: ☐ Text ☐ Email ☐ Mobile ☐ Other ______________________________

Personal Information

Primary:		
DOB:	Age:	US Citizen: ☐ Yes ☐ No
Address:		
City:	State:	Zip:
Email:		
Primary Phone:	Work:	
Occupation:	How long?	
Retired: ☐ Yes ☐ No	Disabled: ☐ Yes ☐ No	
Company Name:		
Work Address:		
City:	State:	Zip:
Social Security #:		
ID #:	State:	
Issue Date:	Expire Date:	

Co-Client:		
DOB:	Age:	US Citizen: ☐ Yes ☐ No
Address:		
City:	State:	Zip:
Email:		
Primary Phone:	Work:	
Occupation:	How long?	
Retired: ☐ Yes ☐ No	Disabled: ☐ Yes ☐ No	
Company Name:		
Work Address:		
City:	State:	Zip:
Social Security #:		
ID #:	State:	
Issue Date:	Expire Date:	

Family: Beneficiaries, Dependents and Heirs

Name	DOB	SS #	Relationship	Address	City, State, Zip

McCabe Wealth Management

BuildMyProfile™ Advisor

Estate and Advisors

Do you have a Will? ☐ Yes ☐ No Date: __________ Do you have a TRUST? ☐ Yes ☐ No Date: __________

Do you have a Medical Directive? ☐ Yes ☐ No Date:_______ Do you have a POA? ☐ Yes ☐ No Date:________

Do you have a Tax Advisor? ☐ Yes ☐ No Name: ____

Do you have an Attorney? ☐ Yes ☐ No Name: ____

Monthly Income

Primary

Earned Income	$	
Social Security	$	
Pension Income	$	
Interest Income	$	
Investment Income	$	
Real Estate Income	$	
Other	$	
Monthly Expenses	-$	
Net Totals	$ 0	
Marginal Tax Bracket		%
Are you contributing to 401k or 403b?	% or	Max
	Match ☐ Yes	%

Co-Client

Earned Income	$	
Social Security	$	
Pension Income	$	
Interest Income	$	
Investment Income	$	
Real Estate Income	$	
Other	$	
Monthly Expenses	-$	
Net Totals	$ 0	
Marginal Tax Bracket		%
Are you contributing to 401k or 403b?	% or	Max
	Match ☐ Yes	%

Insurance Information

Primary

Insurance	Type	Face Amount	Premium	Cash Value
Group Life				
Life Ins.				
Life Ins.				
Disability	STD ☐ LTD ☐			
LTC				
Property	Auto ☐ Home ☐	Company	Last Reviewed?	
Sup. Health	Carrier:	☐ Med Gap ☐ Medicare B ☐ D ☐Other		
Tobacco use? ☐ Yes ☐ No Cancer in past 10 years? ☐ Yes ☐ No				
Mother's Age: _________ Still Living: ☐ Yes ☐ No		Father's Age: _________ Still Living: ☐ Yes ☐ No		

Co-Client

Insurance	Type	Face Amount	Premium	Cash Value
Group Life				
Life Ins.				
Life Ins.				
Disability	STD ☐ LTD ☐			
LTC				
Property	Auto ☐ Home ☐	Company	Last Reviewed?	
Sup. Health	Carrier:	☐ Med Gap ☐ Medicare B ☐ D ☐Other		
Tobacco use? ☐ Yes ☐ No Cancer in past 10 years? ☐ Yes ☐ No				
Mother's Age: _________ Still Living: ☐ Yes ☐ No		Father's Age: _________ Still Living: ☐ Yes ☐ No		

Personal Financial Goals

Goals	Description of Goal (Retirement, College Planning, Boat, 2nd Home, Gifting, Vacation)	Target Date
Goal #1		
Goal #2		
Goal #3		

Primary Desired Retirement Age?	Primary Desired Retirement Income $
Co-Client Desired Retirement Age?	Co-Client Desired Retirement Income $

Social Security Estimates (available at www.SSA.gov)	Early Retirement Age	Full Retirement Age		Delayed
	Age 62	Age	Amount	Age 70
Primary			$	$
Co-Client			$	$

Balance Sheet

Assets (Banking, Investments, Real Estate, Other Assets)		**Liabilities / Debts** (Mortgages, Auto Loans, Credit Cards, Student, Etc.)		
Owner / Institution / Description	Balance	Owner / Institution / Description	%	Balance
Total Assets	0	Total Liabilities		0
		Net Worth		0

Solving for Retirement Income Worksheet

Your current age (1 to 120)

____

Current annual income ($)

____

Spouse's annual income (if applicable) ($)

____

Current retirement savings ($)

____

Expected inflation (0% to 10%)

____

Desired retirement age (1 to 120)

____

Number of years of retirement income (1 to 40)

____

Income replacement at retirement (0% to 300%)

____

Pre-retirement investment return (-12% to 8%)

____

Post-retirement investment return (-12% to 8%)

____

Include Social Security (SS) benefits?
☐ Yes ☐ No

Marital status (For SS purposes only)
☐ Married ☐ Single

Social Security override amount
(Monthly amount in today's dollar) ($)

____

Financial Calculators