FINANCIAL PLANNING WORKSHEET

Date ____________________ SSN ____________________ Rate ____________________

Name ______________________________ Age ______________________________

Pay Grade ______________________________ Yrs. in Svc. ______________________________

Date Reported/PRD (Transfer) ____

Marital Status ____________________ Spouse's Name ____________________ Age ____________________

Spouse's Place of Employment ____

Number of Children and Ages ____

Home Address ____

Work Telephone ______________________________ Home Telephone ______________________________

Command & Referred By (Self, CMD, NMCRS, FFSC, etc.) ______________________________

Amount of SGLI Elected ______________________________ Amount of FSGLI Elected ______________________________

TSP Monthly Contribution ______________________________ MGIB Monthly Contribution ______________________________

STATEMENT OF NET WORTH

ASSETS

Cash on hand	$ __________
Checking accounts	$ __________
Savings accounts	$ __________
Certificates of Deposit	$ __________
Cash value of Life Insurance	$ __________
U.S. Savings Bonds	$ __________
Mutual Funds/Money Market	$ __________
Stocks/Bonds	$ __________
College Funds	$ __________
401(k)/403(b)/TSP	$ __________
Other (IRAs, etc.)	$ __________
Real Estate (Market Value)	$ __________
Home	$ __________
Rental Property	$ __________
Other (Vac Home/Trailer/Time Share)	$ __________
Personal Property	
Vehicles/Motorcycles/Boats	$ __________
Furniture	$ __________
Jewelry	$ __________
Other (Collectibles, etc.)	$ __________

Counseling Provided By: ______________________________

Counselor Phone #: ______________________________

Appointment Date: ______________ Time: ______________

Place: ______________________________

LIABILITIES

Signature Loans	$ __________
Auto Loans or Leases	$ __________
Consolidation Loans	$ __________
Student Loans	$ __________
NEX/AAFES (Star Card)	$ __________
Department Store Credit Cards	$ __________
Other Credit Cards	$ __________
NMCRS (Loan)	$ __________
Other (Friends, Relatives, etc.)	$ __________
Advance/Over Payments	$ __________
Mortgages-Balances Due	
Home	$ __________
Rental Property	$ __________
Other (Vac Home/Trailer/Time Share)	$ __________

TOTAL ASSETS	**$** __________
TOTAL LIABILITIES	**$** __________
NET WORTH (Assets - Liabilities)	**$** __________