McKEON FINANCIAL
An Independent Financial Planning Firm
Specializing in Non-Stock Market Investments

Confidential Profile

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CONFIDENTIAL PROFILE

This comprehensive, personal financial planning summary is designed to help you take inventory and assign realistic values to your personal assets and liabilities. It is the essential first step in organizing a sensible financial plan for your future.

FAMILY INFORMATION

Your Name	Nickname	Age	Birthdate	Social Security # (Optional)
Spouse's Name	Nickname	Age	Birthdate	Social Security # (Optional)

Children's Names & Ages:

1) 3)

2) 4)

Residence Address	City	State	Zip Code
Mailing Address	City	State	Zip Code
Home Phone	Cell	Fax	Email

Referred By: ☐ TV ☐ Yellowbook ☐ Event

Name

OCCUPATION

Your Job Title	Employer (last, if retired)	# of Years	Work Phone	Retirement Date
Spouse's Job Title	Employer (last, if retired)	# of Years	Work Phone	Retirement Date

PERSONAL ADVISORS

Financial Advisor's Name:		Firm:
Do you have a preference for or a commitment to this advisor?	☐ Yes ☐ No	
Attorney's name:		Firm:
Do you have a preference for or a commitment to this advisor?	☐ Yes ☐ No	
Accountant's Name:		Firm:
Do you have a preference for or a commitment to this advisor?	☐ Yes ☐ No	
Insurance Agent's Name:		Firm:
Do you have a preference for or a commitment to this advisor?	☐ Yes ☐ No	
Stockbroker's Name:		Firm:
Do you have a preference for or a commitment to this advisor?	☐ Yes ☐ No	

WEALTH PLAN

At McKeon Financial, we focus on holistic wealth planning which encompasses all your objectives. A Wealth Plan is a GPS designed to effectively guide you toward your life goals and dreams. Some questions we will ask you to consider:

What do you value most in life?

What do you ultimately want to achieve in your life?

What are your top of mind thoughts, ideas, questions and concerns for each of the following?

Stock Market Alternatives:

Retirement Planning:

Taxes & Wealth Accumulation:

Insurance Protection:

Estate and Legacy Planning:

OBJECTIVES

Stock Market Alternatives

Does your current investment portfolio reflect your opinion of the economy/markets? ☐ Yes ☐ No ☐ Uncertain

Do you worry about any of your investments? ☐ Yes ☐ No ☐ Uncertain

If so, which one(s): ____

Are you dissatisfied with any of your current investments? ☐ Yes ☐ No ☐ Uncertain

If so, which one(s): ____

Are you concerned about the stock market, or that we are "overdue" for a correction? ☐ Yes ☐ No ☐ Uncertain

Are you concerned about rising interest rates negatively affecting the bond markets? ☐ Yes ☐ No ☐ Uncertain

Are you interested in diversifying some of your investments outside of stocks and bonds? ☐ Yes ☐ No ☐ Uncertain

Outside of your home, do you own any income producing "hard assets" such as real estate? If so, what kind? ____________________

____

Retirement Planning

Currently Working:

Are you contributing to a retirement plan and/or to an IRA Account? ☐ Yes ☐ No ☐ Uncertain

What minimum income will you need at retirement (in today's dollars)? $____________________

What income sources are you expecting at retirement?

Source: ______________________________ Amount: $____________

Source: ______________________________ Amount: $____________

Source: ______________________________ Amount: $____________

Source: ______________________________ Amount: $____________

How much does that add up to (in today's dollars)? Total: $____________

Do you have a current written Retirement Plan? ☐ Yes ☐ No ☐ Uncertain

When do you plan to retire? ______________________________

If Already Retired:

Is your present income adequate to meet your monthly expenses? ☐ Yes ☐ No ☐ Uncertain

If applicable, will your pension(s) continue to your spouse upon your death? ☐ Yes ☐ No ☐ Uncertain

Taxes & Wealth Accumulation

Do you feel you are paying more than your fair share of taxes? ☐ Yes ☐ No ☐ Uncertain

Are you utilizing any tax-advantaged investments? ☐ Yes ☐ No ☐ Uncertain

Is your accountant is doing a good job advising you on your tax planning? ☐ Yes ☐ No ☐ Uncertain

If applicable, is all the interest on your debt tax deductible? ☐ Yes ☐ No ☐ Uncertain

Are you spending less than you are making? ☐ Yes ☐ No ☐ Uncertain

How much money is available each month for you to save, insure, or invest? $______________________________

Insurance Protection

Do you have life insurance? ☐ Yes ☐ No ☐ Uncertain

If so, Type and Amount: ______________________________

If you died yesterday, would your spouse/family have adequate income to maintain their standard of living? ☐ Yes ☐ No ☐ Uncertain

Do you have long-term care insurance for home and facility care expenses? ☐ Yes ☐ No ☐ Uncertain

If so, Type and Amount: ______________________________

Do you have disability coverage? ☐ Yes ☐ No ☐ Uncertain

If so, Type and Amount: ______________________________

Do you have an umbrella policy over your home and auto insurance? ☐ Yes ☐ No ☐ Uncertain

If so, how much? $______________________________

Have you reviewed your insurance contracts/policies in the last five years? ☐ Yes ☐ No ☐ Uncertain

Estate and legacy Planning

Do you have a will? ☐ Yes ☐ No ☐ Uncertain

If so, what year was it written? ______________ When was it last reviewed? ______________

Have you established any trusts? ☐ Yes ☐ No ☐ Uncertain

If so, when was it established? ______________________________

What kind of trust is it (revocable or irrevocable?) ☐ Revocable (Living) ☐ Irrevocable

When was your trust last reviewed? ______________________________

Do you have a Power of Attorney? ☐ Yes ☐ No ☐ Uncertain

Do you expect to receive any inheritances? ☐ Yes ☐ No ☐ Uncertain

FAMILY FINANCIALS

CURRENT BALANCE SHEET	CURRENT INCOME STATEMENT

ASSETS

Investments (Non-Retirement):

Stocks $__________________
Bonds $__________________
Mutual Funds $__________________
Other $__________________

Investments (Retirement):

IRA $__________________
401k $__________________
403b $__________________
Profit Sharing $__________________
Other $__________________

Business $__________________
Real Estate $__________________

LIABILITIES

Short-Term:

Credit Cards $__________________

Long-Term:

Home $__________________
Business $__________________
Property $__________________

ANNUAL INCOME

Earned Income $_____________
Investment Income $_____________
Social Security $_____________
Other $_____________

Total $_____________

ANNUAL EXPENSES

Fixed $_____________
Variable $_____________

Total $_____________

OTHER ASSETS/LIABILITIES

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____

____

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ADDITIONAL ITEMS