



Means Review Update

Your Name(s): _____ Today's Date: _____

Please provide a recent statement for any investment accounts that are NOT under our management or supervision. Examples include:

- Checking/Savings
- IRA
- Brokerage Acct
- SEP / SIMPLE
- 401(k)
- 457 Def. Comp
- 403(b)/TSA
- Annuity

Direct Income Sources: Please list updated figures for any current and future income sources not currently under our management. Examples include: Wages, Social Security, Pensions, Business Income, Royalties, Rental Property (Net Income)

Who	Income Type (salary, SSN, etc.)	Gross Monthly Amount	COLA %	Starting Date	Ending Date

Other Property / Illiquid Assets: Please list updated figures for any other illiquid assets whose value may be available for current or future goals. Examples include: Real Estate, Business Interests, Personal Property, etc.

Who	What Is It	Current Value	Growth Rate	What are your intentions

Are you expecting any financial windfalls? (inheritance, property transfer, etc.) If so, how much do you anticipate, when do you anticipate it, and what plans do you have for the money: _____

Notes: _____