



CONDITIONOMICS
FACT FINDER™

wealth is not about the money...

Name:

Date:

CONTACT INFORMATION

Family Members						
	Name	Birth Date	Soc Sec#	Occupation	Employer	Since
Self						
Spouse						
Address				Since	Phone Email	
Children						

Special Needs		
Name	Relationship	Special Needs

Advisors				
	Name	Phone	Firm	Address
Attorney				
Accountant				
Investment				
<u>Insurance:</u>				
Life				
Disability				
Property				

Bank(s)		
		Safe Deposit Box
Name(s)		Box #:
Location(s)		

PROTECTION INSTRUMENTS

Check box if "Yes"

Life Insurance			Issue	Death	Annual	Waiver	Cash	CV	Primary	Contingent	
*S/Sp	Company	*Type	Date	Benefit	Premium	(Y/N)	Value	Loans	Owner	Beneficiary	Beneficiary

*S/Sp=Self/Spouse; Type= T (Term); WL (Whole Life); VL (Variable Life); UL (Universal Life)

Disability Insurance		Annual	Monthly	Benefit	Elim	Employer	*(Elected Options)			
S/Sp	Company	Premium	Benefit	Period	Period	Paid	Own	Occ	COLA	FIO

Own Occ=Own Occupation; COLA=Cost of Living Adjustment; FIO=Future Increase Option

Auto Insurance		Annual	#	Full	Personal	Personal	Un/Under	Deductible		
	Company	Premium	Autos	Tort	Liability	Property	Insured	Stacked	Collision	Comp

Home Insurance		Annual	Market	Replacement Cost		Liability	Deductible
	Company	Premium	Value	Dwelling	Contents	(000's)	
1 st							
2 nd							
3 rd							

Umbrella Insurance		Annual	Excess Liability	Deductible
	Company	Premium	Coverage	(Personal Retention)

Health Insurance		Employer	Family	Dental	Vision	Maximum Lifetime Benefit
Insured	Company	Paid	Coverage			

LTC Insurance		Annual	Daily	Elim	Benefit	Pmt	Return of
	Company	Premium	Benefit	Period	Period	Period	Premium
S							
Sp							

Wills & Trusts		Successors			Successors			Successors			Living				
	Location	Executor(s)	1 st	2 nd	Corp	Trustee(s)	1 st	2 nd	Corp	Guardians	1 st	2 nd	*POA	Will	Trust
S															
Sp															

*POA = Power of Attorney

FINANCIAL SNAPSHOT

		Annual Income		Savings			
Date	S (Self)	\$ _____	Salary	Personal Accounts			
		\$ _____	Other	Children Accounts			
	Sp (Spouse)	\$ _____	Salary	Balance	For:	Balance	For:
		\$ _____	Other	\$	_____	\$	_____
	Other	\$ _____	Invest	\$	_____	\$	_____
				\$	_____	\$	_____

Investments	Annual Input	Present Market Value	Outstanding Loan Balance	Loan Rate
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Retirement Accounts	S	<div style="border: 1px solid black; padding: 2px;">\$ _____</div> <div style="border: 1px solid black; padding: 2px;">\$ _____</div>	<div style="border: 1px solid black; padding: 2px;">Employee Contrib</div> <div style="border: 1px solid black; padding: 2px;">Employer Contrib</div>	<div style="border: 1px solid black; border-radius: 50%; width: 60px; height: 60px; margin: 0 auto; display: flex; align-items: center; justify-content: center;">\$</div>	<div style="border: 1px solid red; border-radius: 50%; width: 60px; height: 60px; margin: 0 auto; display: flex; align-items: center; justify-content: center;">\$</div>	<div style="border: 1px solid red; width: 40px; height: 40px; margin: 0 auto; display: flex; align-items: center; justify-content: center;">%</div>
	Sp	<div style="border: 1px solid black; padding: 2px;">\$ _____</div> <div style="border: 1px solid black; padding: 2px;">\$ _____</div>	<div style="border: 1px solid black; padding: 2px;">Employee Contrib</div> <div style="border: 1px solid black; padding: 2px;">Employer Contrib</div>	<div style="border: 1px solid black; border-radius: 50%; width: 60px; height: 60px; margin: 0 auto; display: flex; align-items: center; justify-content: center;">\$</div>	<div style="border: 1px solid red; border-radius: 50%; width: 60px; height: 60px; margin: 0 auto; display: flex; align-items: center; justify-content: center;">\$</div>	<div style="border: 1px solid red; width: 40px; height: 40px; margin: 0 auto; display: flex; align-items: center; justify-content: center;">%</div>

Personal Real Estate	1 st	\$ _____		<div style="border: 1px solid black; border-radius: 50%; width: 60px; height: 60px; margin: 0 auto; display: flex; align-items: center; justify-content: center;">\$</div>	<div style="border: 1px solid red; border-radius: 50%; width: 60px; height: 60px; margin: 0 auto; display: flex; align-items: center; justify-content: center;">\$</div>	<div style="border: 1px solid red; width: 40px; height: 40px; margin: 0 auto; display: flex; align-items: center; justify-content: center;">%</div>
	2 nd	\$ _____		<div style="border: 1px solid black; border-radius: 50%; width: 60px; height: 60px; margin: 0 auto; display: flex; align-items: center; justify-content: center;">\$</div>	<div style="border: 1px solid red; border-radius: 50%; width: 60px; height: 60px; margin: 0 auto; display: flex; align-items: center; justify-content: center;">\$</div>	<div style="border: 1px solid red; width: 40px; height: 40px; margin: 0 auto; display: flex; align-items: center; justify-content: center;">%</div>
	3 rd	\$ _____	Mortgage Pmts	<div style="border: 1px solid black; border-radius: 50%; width: 60px; height: 60px; margin: 0 auto; display: flex; align-items: center; justify-content: center;">\$</div>	<div style="border: 1px solid red; border-radius: 50%; width: 60px; height: 60px; margin: 0 auto; display: flex; align-items: center; justify-content: center;">\$</div>	<div style="border: 1px solid red; width: 40px; height: 40px; margin: 0 auto; display: flex; align-items: center; justify-content: center;">%</div>

Mortgage & Lines of Credit

Growth (Stocks & Funds)		\$ _____		<div style="border: 1px solid black; border-radius: 50%; width: 60px; height: 60px; margin: 0 auto; display: flex; align-items: center; justify-content: center;">\$</div>	<div style="border: 1px solid red; border-radius: 50%; width: 60px; height: 60px; margin: 0 auto; display: flex; align-items: center; justify-content: center;">\$</div>	<div style="border: 1px solid red; width: 40px; height: 40px; margin: 0 auto; display: flex; align-items: center; justify-content: center;">%</div>
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Income (Bonds & Funds)		\$ _____		<div style="border: 1px solid black; border-radius: 50%; width: 60px; height: 60px; margin: 0 auto; display: flex; align-items: center; justify-content: center;">\$</div>	<div style="border: 1px solid red; border-radius: 50%; width: 60px; height: 60px; margin: 0 auto; display: flex; align-items: center; justify-content: center;">\$</div>	<div style="border: 1px solid red; width: 40px; height: 40px; margin: 0 auto; display: flex; align-items: center; justify-content: center;">%</div>
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Private Equity		\$ _____	Business	<div style="border: 1px solid black; border-radius: 50%; width: 60px; height: 60px; margin: 0 auto; display: flex; align-items: center; justify-content: center;">\$</div>	<div style="border: 1px solid red; border-radius: 50%; width: 60px; height: 60px; margin: 0 auto; display: flex; align-items: center; justify-content: center;">\$</div>	<div style="border: 1px solid red; width: 40px; height: 40px; margin: 0 auto; display: flex; align-items: center; justify-content: center;">%</div>
		\$ _____	Other	<div style="border: 1px solid black; border-radius: 50%; width: 60px; height: 60px; margin: 0 auto; display: flex; align-items: center; justify-content: center;">\$</div>	<div style="border: 1px solid red; border-radius: 50%; width: 60px; height: 60px; margin: 0 auto; display: flex; align-items: center; justify-content: center;">\$</div>	<div style="border: 1px solid red; width: 40px; height: 40px; margin: 0 auto; display: flex; align-items: center; justify-content: center;">%</div>

Life Insurance	S	<div style="border: 1px solid black; padding: 2px;">Term Premium</div> <div style="border: 1px solid black; padding: 2px;">\$ _____</div>	<div style="border: 1px solid black; padding: 2px;">Permanent Premium</div> <div style="border: 1px solid black; padding: 2px;">\$ _____</div>	<div style="border: 1px solid black; border-radius: 50%; width: 60px; height: 60px; margin: 0 auto; display: flex; align-items: center; justify-content: center;">\$</div>	<div style="border: 1px solid red; border-radius: 50%; width: 60px; height: 60px; margin: 0 auto; display: flex; align-items: center; justify-content: center;">\$</div>	<div style="border: 1px solid red; width: 40px; height: 40px; margin: 0 auto; display: flex; align-items: center; justify-content: center;">%</div>
		<div style="border: 1px solid black; padding: 2px;">Death Benefit</div> <div style="border: 1px solid black; padding: 2px;">\$ _____</div>	<div style="border: 1px solid black; padding: 2px;">Death Benefit</div> <div style="border: 1px solid black; padding: 2px;">\$ _____</div>			
	Sp	<div style="border: 1px solid black; padding: 2px;">Term Premium</div> <div style="border: 1px solid black; padding: 2px;">\$ _____</div>	<div style="border: 1px solid black; padding: 2px;">Permanent Premium</div> <div style="border: 1px solid black; padding: 2px;">\$ _____</div>			
		<div style="border: 1px solid black; padding: 2px;">Death Benefit</div> <div style="border: 1px solid black; padding: 2px;">\$ _____</div>	<div style="border: 1px solid black; padding: 2px;">Death Benefit</div> <div style="border: 1px solid black; padding: 2px;">\$ _____</div>			

Cash Value Loans

Other Liabilities	(\$ _____)	Description: _____
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