

# PROFOCUS

INCORPORATED

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## PERSONAL INFORMATION WORKSHEET

*Please Print*

Husband		SSAN:
		Date of Birth:
Wife		SSAN:
		Date of Birth:
Address		
Home Telephone (     )	<input type="checkbox"/> Husband <input type="checkbox"/> Wife	Work Telephone (     )
<input type="checkbox"/> Mobile <input type="checkbox"/> Fax <input type="checkbox"/> Pager (     )		
Business Name/Address 1		
Minor Child		SSAN:
		Date of Birth:
Minor Child		SSAN:
		Date of Birth:
Minor Child		SSAN:
		Date of Birth:
Minor Child		SSAN:
		Date of Birth:
E-Mail Address		

# PERSONAL ASSETS AND LIABILITIES WORKSHEET

## Personal Property

	<i>Market Value</i>	<i>Liability</i>	<i>Notes</i>
Home Mortgage			
Rental Property			
Cash/Checking/Savings			
Common Stocks			
Income Mutual Funds			
Growth Mutual Funds			
Limited Partnerships			
Art, Antiques, Stamps, Coins			
Gold, Silver and Options			
Business Interest			
Other Assets			

## Insurance Plans

Life Insurance Net Cash Values			
Annuities			

## Retirement Plans

IRA			
401(k) Profit Sharing			
Keogh			
TDA			
SEP/SIMPLE			

## Non-Working Assets

Automobile			
Personal Property			

## Other Liabilities

Credit Cards		
Home Equity Loans		
Other Loans		

## PERSONAL CASH FLOW WORKSHEET

<b>Income</b>	<b>Monthly</b>	<b>Annually</b>	<b>Expenses</b>	<b>Monthly</b>	<b>Annually</b>
Salary-Husband			Mortgage or Rent		
Salary-Wife			Property Taxes		
Self Emplmnt-H			Utilities		
Self Emplmnt-W			Telephone		
Interest/Dividends			Cable TV		
Pensions/Alimony			Internet		
Social Security			Home Maintenance		
Rental Property (Net)			Childcare		
Other			Car Payments		
<b>Total Income</b>			Gasoline		
			Auto Maintenance		
<b>Taxes</b>			License Fees		
Federal			Tolls/Bus/Parking		
State and Local			Groceries		
Husband:			Work Lunches		
Self Employment			School Lunches		
OASDI			Snacks		
Medicare			Clothing		
Wife:			Furnishings		
Self Employment			Personal Care/Cash		
OASDI			Medical/Dental		
Medicare			Prescription		
<b>Total Taxes</b>			Education/Self Improv		
			Installment Payments		
<b>Insurance</b>			Debt		
<b>Premiums</b>			Dining Out		
Liability			Recreation		
Homeowner's			Gifts (x-mas,birthdays)		
Medical			Vacations		
Long-Term Care			Charitable Contributions		
Automobile			<b>Total Expenses</b>		
<b>Total Premiums</b>					