

PROFOCUS

INCORPORATED

PERSONAL INFORMATION WORKSHEET

Please Print

Husband		SSAN:
		Date of Birth:
Wife		SSAN:
		Date of Birth:
Address		
Home Telephone ()	<input type="checkbox"/> Husband Work Telephone <input type="checkbox"/> Wife	<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

Income	Monthly	Annually	Expenses	Monthly	Annually
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		
Total Income			Gasoline		
Taxes			Auto Maintenance		
Federal			License Fees		
State and Local			Tolls/Bus/Parking		
Husband:			Groceries		
Self Employment			Work Lunches		
OASDI			School Lunches		
Medicare			Snacks		
Wife:			Clothing		
Self Employment			Furnishings		
OASDI			Personal Care/Cash		
Medicare			Medical/Dental		
Total Taxes			Prescription		
Insurance			Education/Self Improv		
Premiums			Installment Payments		
Liability			Debt		
Homeowner's			Dining Out		
Medical			Recreation		
Long-Term Care			Gifts (x-mas,birthdays)		
Automobile			Vacations		
			Charitable Contributions		
Total Premiums			Total Expenses		