



BRENDA BELL & ASSOCIATES
The Financial Answer to Your Prayers

Financial Fact Finder

Brenda Bell & Assoc. | Pre-Meeting Client Snapshot

1. Client Snapshot

Client Name _____ Spouse / Partner _____

Current Age _____ Target Retirement Age _____ Target Retirement Year _____

2. Retirement Income Goal

Desired Monthly Income in Retirement _____ Desired Annual Income _____

What are your top 3 retirement priorities?

3. Current Income Sources

Social Security (Monthly) _____ Pension (Monthly) _____ Pension (Annual) _____

Rental / Other Guaranteed Income _____ Still Working Income _____

4. Current Assets

Checking / Savings _____ IRA / 401(k) _____ Brokerage _____

Annuity Value _____ Home Equity _____ Other Assets _____

5. What to Bring / Confirm for Our Meeting

- Most recent Social Security estimate
- Pension statement / payout estimate
- IRA / 401(k) / retirement account balances
- Checking / savings balances
- Mortgage balance and approximate home value
- List of monthly retirement expenses or current budget



Thank you for completing this document, please download and scan back to
bbellconsultant@gmail.com

[Privacy Statement](#)

Your information is confidential and will only be used to respond to your inquiry and prepare for any requested consultation. Brenda Bell & Associates does not sell or share your personal information with third parties except as necessary to provide requested services or as required by law.