



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
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