



# Deering Wealth Team Financial Planning Worksheet

CONFIDENTIAL

## Real Estate

Residences, Land, Other Real Estate

DESCRIPTION	TAX BASIS	MARKET VALUE	MORTGAGE BALANCE	LOAN RATE

## Liabilities

Student Loans, Vehicle Loans, Credit Cards

DESCRIPTION	LOAN BALANCE	INTEREST RATE

## Other Assets

Antiques, Artwork, Automobiles

DESCRIPTION	TAX BASIS	MARKET VALUE	DEBT BALANCE	LOAN RATE

## Insurance

Life, Disability Income, Long-Term Care

COMPANY	DESCRIPTION (E.G. TERM, WHOLE)	INSURED	BENEFIT

Earned Income \_\_\_\_\_

Other Income (e.g. pension) \_\_\_\_\_

Estimated Monthly Expenses \_\_\_\_\_

Estimated Social Security Benefits \_\_\_\_\_

Desired Retirement Ages \_\_\_\_\_

Please indicate if applicable:

- Budget / Spending Plan
- Fully Funding IRA Accounts
- Updated Will
- Living Will
- General POA
- Healthcare POA
- Umbrella Insurance

