

Client Information Folder



Cash Flow

- Earn additional income
- Manage expenses



Debt Management

- Consolidate debt
- Strive to eliminate debt



Emergency Fund

- Save 3-6 months' income
- Prepare for unexpected expenses



Proper Protection

- Protect against loss of income
- Protect family assets



Build Wealth

- Strive to outpace inflation & reduce
- Professional money management



Preserve Wealth

- Reduce taxation
- Build a family legacy

Client Name: _____

Spouse: _____

Associate: _____

Date: _____