

**FINANCIAL PLANNING WORKSHEET**

	ACTUAL	PROJECTED	REMARKS
NAME		SSN:	5/15/2013
AGE			
PAYGRADE (E1, W2,O1E, ETC.)			Select from pulldown menu.
YEARS IN SERVICE			Select from pulldown menu.
DATE REPORTED/PRD (TRANSFER)			Reported (Actual)/PRD (Projected)
MARITAL STATUS ( S, WD, P, G, D)	Gov't Qtrs	Gov't Qtrs	Select BAH from pulldown menu.
SPOUSE'S NAME			
SPOUSE'S AGE			Required to compute FSGLI.
SPOUSE'S PLACE OF EMPLOYMENT			
NUMBER OF CHILDREN and AGES			Living with in act/away in proj.
HOME ADDRESS			
WORK TELEPHONE			
HOME TELEPHONE			
COMMAND & REFERRED BY:			Self, CMD, NMCRS, FFSC, Etc.
AMOUNT OF FSGLI ELECTED	100,000	100,000	Select from pulldown menu.
AMOUNT OF SGLI ELECTED	400,000	400,000	Select from pulldown menu.
TSP BASEPAY CONTRIBUTION			Enter TSP Contribution %
TSP BONUS/INCENTIVE/SPECIAL PAY			Enter Dollar Amount
MGIB MONTHLY CONTRIBUTION	0	0	Select from pulldown menu.

**STATEMENT OF NET WORTH**

ASSETS	LIABILITIES
CASH (On Hand)	Signature Loans
Checking Accounts	Auto Loans or Lease
Saving Accounts	Consolidation Loans
Certificates of Deposits	Student Loans
Cash value of life insurance	NEX/AAFES (Star Card)
U.S. Savings Bonds	Dept Store Credit Cards
Mutual Funds/Money Market	Other Credit Cards
Stocks/Bonds	N&MCRS (Loan)
College Funds	Other (Friends, Relatives, etc.)
401(k)/403(b)/TSP	Advance/Over Payments
Other (IRAs, etc.)	
<b>Real Estate (Market Value)</b>	<b>Mortgages-Balances Due</b>
Home	Home
Rental Property	Rental Property
Other (Vac Hm/Trailer/Time Share)	Other (Vac Hm/Trailer/Time Share)
<b>Personal Property</b>	
Vehicles/Motorcycles/Boats	
Furniture	
Jewelry	
Other (Collectibles, etc.)	
<b>TOTAL ASSETS</b>	<b>TOTAL LIABILITIES</b>

NET WORTH

Counseling Provided By:

Counselor Phone #: