

**CURRENT ANNUAL INCOME**

	Client 1	Increase rate/yr	Client 2	Increase rate/yr
Salary (Gross)				
Bonus				
Net Business Income (Loss)				
Dividends / Interest				
Social Security				
Net Rental Prop. Income (Loss)				
Gifts				
Retirement Income*				
Other				
Total Gross Income				

\*If pension income please describe any survivorship options below.

**RESIDENCE - ONLY IF PLANNING TO SELL**

ASSET
Current Residence Market Value
Original Cost+Improvements
Client Age at Sale
Sales Costs (% of sale price)
Cost of Replacement Home
New Mortgage (% of replacement home price)
Interest Rate on New Mort. Loan
Number of Years for New Loan

Res.#1	Res.#2