New Client Application Form

TODD MANN FINANCIAL SERVICES

Life & Financial Goals

What would you like to improve in your life?	Additional Worksheets Below	Useful Documents
❑ Financial Stability ❑ Maximize Savings ❑ Eliminate Bad Debts ❑ Become a Homeowner ❑ Have More Free Time to _____	❑ Income Worksheet ❑ Expense Worksheet ❑ Assets/Debts Worksheet ❑ Financial Concerns Worksheet	❑ Credit Report ❑ Credit Card Statements ❑ Bank Statements ❑ Loan statements ❑ Benefits Statement
❑ Build and Grow Wealth ❑ Protect Assets and Dependents ❑ Prepare for Retirement ❑ Become More Tax Efficient ❑ Leave a Legacy	❑ Income Worksheet ❑ Assets/Debts Worksheet ❑ Retirement Worksheet ❑ Insurance Worksheet ❑ Risk Tolerance Worksheet	❑ Investment Statements ❑ Bank Statements ❑ Taxes & W2s ❑ Insurance Statements ❑ Wills/Trusts
❑ Reduce Costs of Insurance: ☐ Life Insurance ☐ Health/Dental/Vision Insurance ☐ Medicare Advantage or Supplements ☐ Disability or Long-Term Care Insurance	❑ Insurance Worksheet ❑ Assets/Debts Worksheet	❑ Insurance Statements
❑ Start a New Business ❑ Improve Business Profitability ❑ Improve Employee Retention ❑ Prepare for a Transition	❑ Business Worksheet ❑ Assets/Debts Worksheet	❑ Business Plan ❑ Business Contracts ❑ Employee Benefits Package ❑ Financial Statements ❑ Business Account Statements

Other Objectives:

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