



PALMCAPITAL

M A N A G E M E N T

Requested Information:

1. Name
2. Date of Birth
3. Marital Status
4. Children
 - a. How many?
 - b. How old?
5. Occupation
6. Income
7. Goals
 - a. Age to Retire
 - b. Basic Living Expenses
 - c. Healthcare
 - d. New Vehicle(s)
 - e. Travel
 - f. Major purchase(s)
 - g. Hobbies/Misc. Expenses
8. Retirement Income
 - a. Social Security
 - b. Pension(s)
 - c. Rental Property Income
 - d. Annuities
9. Investment Assets
 - a. Company-Sponsored Plan(s)
 - b. IRA(s)
 - c. Brokerage Account(s)
 - d. Trust Account(s)
 - e. Savings Account(s)
 - f. Education Account(s)
10. Other Assets
 - a. Real Estate
 - b. Limited Partnerships
11. Life and Health Insurance
12. Liabilities
 - a. Mortgage(s)
 - b. HELOC(s)
 - c. Credit Card Debt
 - d. Vehicle Loan
 - e. Business Loan
 - f. Personal Debt

**In order to conduct a thorough analysis, please provide the requested applicable information. Attach another page if necessary.*

Please scan and email your completed document(s) to info@palmcm.com. We will respond within 24 hours to schedule your appointment. Thank you.