



REAL WEALTH ADVISORS

414.808.2345
300 NORTH EXECUTIVE DRIVE, SUITE 125
BROOKFIELD, WI 53005
www.realwealthadvisors.com

PERSONAL

	Self	Spouse
Name :	<input type="text"/>	<input type="text"/>
Date Of Birth :	<input type="text"/> / <input type="text"/> / <input type="text"/>	<input type="text"/> / <input type="text"/> / <input type="text"/>
Soc Sec # :	<input type="text"/> - <input type="text"/> - <input type="text"/>	<input type="text"/> - <input type="text"/> - <input type="text"/>
Marital Status :	<input type="text"/>	<input type="text"/>
Drivers License # & Exp :	<input type="text"/>	<input type="text"/>
Home Phone :	<input type="text"/>	<input type="text"/>
Cell Phone :	<input type="text"/>	<input type="text"/>
Home Email :	<input type="text"/>	<input type="text"/>
Pref. Contact Method :	<input type="checkbox"/> Email <input type="checkbox"/> Phone <input type="checkbox"/> Text	<input type="checkbox"/> Email <input type="checkbox"/> Phone <input type="checkbox"/> Text

CONTACT INFORMATION

Address :	<input type="text"/>		
City :	<input type="text"/>	State : <input type="text"/>	Zip Code: <input type="text"/>

BENEFICIARIES

Name	Date of Birth	%	Notes
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

EMPLOYMENT

	Primary	Spouse
Employer :	<input type="text"/>	<input type="text"/>
Job Title :	<input type="text"/>	<input type="text"/>
Address :	<input type="text"/>	<input type="text"/>
Years at Employer :	<input type="text"/>	<input type="text"/>
Salary :	<input type="text"/>	<input type="text"/>

ESTIMATED INCOME

Adj Gross Inc. (AGI)	<input type="text"/>	Taxable	<input type="text"/>	Tax Bracket	<input type="checkbox"/> 10-22% <input type="checkbox"/> 24-32% <input type="checkbox"/> 35-37%
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Securities offered through **Securities America, Inc.** Member FINRA/SIPC. Real Wealth Advisors, LLC is independent of **Securities America, Inc.** and Real Wealth Advisors, LLC. Investment advisory services offered through **Securities America Advisors, Inc.** Important information from FINRA to consider before transferring your account.

CURRENT ASSETS

Statements for individual accounts are always preferred and a link to a secure folder is included in this email. However, if you prefer to imply disclose values, please list below.

SOCIAL SECURITY

	Primary	Spouse
Amount @ Full Ret. Age:	<input type="text"/>	<input type="text"/>

PENSION

Monthly Amount :	<input type="text"/>	<input type="text"/>
At What Age :	<input type="text"/>	<input type="text"/>
Survivor Benefit :	<input type="checkbox"/> 50% <input type="checkbox"/> 75% <input type="checkbox"/> 100%	<input type="checkbox"/> 50% <input type="checkbox"/> 75% <input type="checkbox"/> 100%

401(k) / 403(b)

Current Value :	<input type="text"/>	<input type="text"/>
Annual Contribution :	<input type="text"/>	<input type="text"/>
Matching Contribution :	<input type="text"/>	<input type="text"/>

INVESTMENTS

Traditional IRA :	<input type="text"/>	<input type="text"/>
Traditional IRA :	<input type="text"/>	<input type="text"/>
Roth IRA :	<input type="text"/>	<input type="text"/>
Non Retirement Acct :	<input type="text"/>	<input type="text"/>
Non Retirement Acct :	<input type="text"/>	<input type="text"/>
Annuity :	<input type="text"/>	<input type="text"/>
Crypto :	<input type="text"/>	<input type="text"/>
Other :	<input type="text"/>	<input type="text"/>

LIFE INSURANCE

	Work			Individual			Work			Individual		
Term / Universal :	<input type="text"/>	/	<input type="text"/>	<input type="text"/>	/	<input type="text"/>	<input type="text"/>	/	<input type="text"/>	<input type="text"/>	/	<input type="text"/>
Carrier :	<input type="text"/>	/	<input type="text"/>	<input type="text"/>	/	<input type="text"/>	<input type="text"/>	/	<input type="text"/>	<input type="text"/>	/	<input type="text"/>
Death Ben / Cash Value :	<input type="text"/>	/	<input type="text"/>	<input type="text"/>	/	<input type="text"/>	<input type="text"/>	/	<input type="text"/>	<input type="text"/>	/	<input type="text"/>
Premium / Mode :	<input type="text"/>	/	<input type="text"/>	<input type="text"/>	/	<input type="text"/>	<input type="text"/>	/	<input type="text"/>	<input type="text"/>	/	<input type="text"/>

LONG TERM CARE

Long Term Care :	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
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REAL ESTATE

	City	Market Value	Purchase \$	Mortgage \$	Mortgage %	YR Pd Off
Primary Residence :	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Secondary Residence :	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

THE MOST IMPORTANT THING I WANT TO TALK ABOUT IS:



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