Future Focused.

FOX WEALTH PARTNERS

Personal Information

Name (Last, First MI)	Spouse/Partner's (Last, First MI)
Mailing Address	Mailing Address
State of Primary Residence	State of Primary Residence
Date of Birth (mm/dd/yyyy)	Date of Birth (mm/dd/yyyy)
Total Annual Earned Income	Total Annual Earned Income

Filing Status: ☐ Single ☐ Married ☐ Partners/Other

Retirement Goals

Description	Ideal	Acceptable
Client Retirement Age:		
Spouse/Partner Retirement Age:		
Retirement spending goal (after tax)	$	$
Estate Goal	$	$
Decrease / increase in savings	$	$

Social Security

Description	Client	Spouse/Partner
Estimate benefits:	☐	☐
Currently collecting:	$	$
Expect to collect:	$	$
Do not include Social Security:	☐	☐

Please choose only one Social Security option per person

Other Goals

Please indicate specific spending goals, in addition to your retirement spending goal, that you would like to include in this eMoney Investment Plan. (i.e. weddings, education, travel, etc.)

Description	Annual Amount	Net or Gross	Whose age?	Start age?	End age?	Annual Increase (0.00% - 14.00%)
	$					%
	$					%
	$					%
	$					%
	$					%

Other Income

Please list all other sources of Income

Description	Annual Amount	Net or Gross	Whose age?	Start age?	End age?	Annual Increase (0.00% - 14.00%)
	$					%
	$					%
	$					%
	$					%
	$					%

Account Summary & Future Savings

Please list the total value and account details of each financial account in which you hold an interest.

Account Name (Name of account holder)	Account No.	Cost Basis (Orig. Purchase Price)	Current Value	Annual Contribution	Tax Status		
					Taxable	Tax-Dfd	Tax-Exmpt
		$	$	$	☐	☐	☐
		$	$	$	☐	☐	☐
		$	$	$	☐	☐	☐
		$	$	$	☐	☐	☐
		$	$	$	☐	☐	☐
		$	$	$	☐	☐	☐

Other Assets

Please list all additional assets. (Home, business assets, rental property, automobiles, etc.)

Description	Current Value	Owner	Annual Increase (0.00% - 14.00%)
	$		%
	$		%
	$		%
	$		%
	$		%

Other Liabilities

Please indicate debts, mortgages, loans, etc…

Description	Liability Type (Mortgage, Loan, Other)	Current Amount	Owner	Monthly Payment	Interest Rate
		$		$	%
		$		$	%
		$		$	%
		$		$	%
		$		$	%

Comments

Investment products and services are offered through Wells Fargo Advisors Financial Network, LLC (WFAFN), Member SIPC. Fox Wealth Partners is a separate entity from WFAFN.