# FINANCIAL PLANNING WORKSHEET

Date	SSN	Rate	
Name		Age	
Pay Grade	Yrs. in Svc.	Date Reported/PRD (Transfer)	
Marital Status	Spouse's Name	Age	
Spouse's Place of Employment	4		
Number of Children and Ages _			
Home Address			
Work Telephone		Home Telephone	
Command & Referred By (Self, Ch	ND, NMCRS, FFSC, etc.)		
Amount of SGU Elected		Amount of PSGLI Elected	
TSP Monthly Contribution		MGIB Monthly Contribution	

	3 IAI EIIIL	ENT OF NET WORTH	
ASSETS		LIABILITIES	
Cash on hand	5	- Signature Loans	5
Checking Accounts	5	Auto Loans or Leases	5
Savings Accounts	5	Connected attended to hear	s
Certificates of Deposit	5		
Cash Value of Life Insurance	5	Student Loans	5
U.S. Savings Bonds	5	NEX/AAFES (Star Card)	5
Mutual Funds/Money Market	5	Department Store Credit Cards	5
Stocks/Bonds	3	Other Credit Cards	5
College Funds 401(k)/403(b)/TSP	3	NMCRS (toan)	s
Other (IRAs, etc.)	5	Other (friends, relatives, etc.)	5
Real Estate (Market Value)		Advance/overpayments	5
Home	\$		
Rental Property	5	Home	5
Other (vacation home/trailer/time share)	5		5
Personal Property			
Vehicles/Motorcycles/Boats \$		Other (vacation home/trailes/time share)	5
Furniture	s		
Jewelry	5	TOTAL ASSETS	s
Other (collectibles, etc.)	5		
Counseling Provided By:		TOTAL LIABILITIES	s
Counselor Phone #:			
Appointment Date:			
Place:		Octobers - Committees)	*

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**RM Cervero** 

Personal Financial Planning Worksheet Essays:

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