

COMPREHENSIVE FINANCIAL GROUP INC.

Retirement Specialists since 1991

CONFIDENTIAL FINANCIAL WORKSHEETS

Comprehensive Financial Group Inc.

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With 30 years of experience, our process is different than what you normally experience with a financial service company. Most brokers try to sell you products that have higher rates of return, which greatly increases your risk. These products increase the broker's income but may jeopardize your future retirement.

We believe in helping you understand how we can help you make good financial decisions for your future to ensure a safe, secure, and comfortable retirement!

Our focus is to:

1. Increase Your Wealth
2. Reduce Your Taxes
3. REDUCE or ELIMINATE the NEGATIVE EFFECTS OF THE ERODING FACTORS that can ruin your financial future.

The ERODING FACTORS Are:

1. Market Losses
2. Outliving Your Money
3. Inflation
4. High Fees and/or Charges
5. Death, Disability, and Taxes

Our approach is the reason our process is a proven success, and it allows our clients to sleep at night knowing they have secured their financial future.

There are no fees or charges for our services. We are paid directly from the company!

We believe in FINANCIAL EDUCATION, so congratulations on taking the first step.

Sincerely,

James R. Grazioli – President

The following annuity worksheets can be completed on your personal computer by saving them and using the free Adobe Acrobat Reader DC program to fill-in the information. Or, complete the form here at this website, then follow the steps below to save the form.

To do so, complete the following steps:

1. Right click the mouse button and select "save as"
2. Rename form with your name and today's date 3/23/2021
3. Select where you want to save the form on your computer
4. Click "Save"

After saving this form to your computer open it with Adobe Acrobat Reader DC and fill-in the requested information. If you do not have Adobe Acrobat Reader DC, you can download it at: <https://get.adobe.com/reader/>

Make sure to uncheck any "OPTIONAL OFFERS" you do not want before downloading the Adobe Reader DC

Once this form is saved to your computer and completed you can email it to: James R. Grazioli by clicking on this button - **Email Form to James R. Grazioli**

If you prefer to print and fill out the form by hand, click on this button - **Print Form**

Note: To accept the information you have entered in a field and go to the next field, press [TAB] or use your mouse to click on the next field.

CLIENT: _____

DATE: 3/23/2021

1. What are you currently doing in preparing for your financial future?
2. What do you like most about what you are doing?
3. What don't you like about your current financial planning?
4. What would you like to see enhanced or improved?
5. What has been your experience with preparing for your financial future?
6. What would you "ideally" like to accomplish with your financial strategy?
7. Tell me about your decision-making process.
8. What keeps you up at night?

Which question above is the most important to you?

Explain Why:

How important are the following benefits to you?	Not important	Important	Very important
A. Safety of Principal and Earnings (No Losses)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
B. Potential Earnings with a Guarantee of No Losses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
C. Reducing Income Taxes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
D. Access to Cash without Penalties	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
E. Avoid Probate - Inheritance Directly to Beneficiaries	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Approximately when do you plan to start your Retirement Income?

Now or How many years

PERSONAL INFORMATION - **Reset**

Client 1

Client 2

Name		
Address		
City, State, Zip Code		
Phone Number		
Does this phone accept texts?	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>
Email		
Date of Birth		

PLEASE USE APPROXIMATE WHOLE NUMBERS ON ALL SHEETS

SAVINGS & RETIREMENT PLANSClient 1 **Reset**Client 2 **Reset**

Assets

Current Value

Current Value

Checking		
Savings		
Money Market		
CD's		
Non-IRA Brokerage Accounts		
IRA Brokerage Accounts		
401(k) still working there?	<input type="checkbox"/>	<input type="checkbox"/>
403(b) still working there?	<input type="checkbox"/>	<input type="checkbox"/>
Annuity IRA		
Annuity Non-IRA		
Other Investments:		
Other Investments:		
TOTAL	0	0

Are you currently contributing to any of the above Plans? Yes **No**

If yes, state the contribution amount(s) below:

Plan	Amount	Plan	Amount
Savings		Non-IRA Brokerage Accounts	
Money Market		IRA Brokerage Accounts	
CD's		Annuity IRA	
401(k)		Annuity Non-IRA	
403(b)		Other Investments	

MONTHLY INCOME

Client 1 Reset	Monthly Amount	Stop or Start Date if any
Current Income:		
Job or Business		Stop:
Pension Income		Start:
Pension Income Survivorship: Check One 100% <input type="checkbox"/> 75% <input type="checkbox"/> 50% <input type="checkbox"/> 0% <input type="checkbox"/>	NA	NA
Social Security* Started or Expected		Start:
Monthly Withdrawal from Investments		Start: Stop:
Income from Other Source:		Start: Stop:
Income from Other Source:		Start: Stop:
Income from Other Source:		Start: Stop:
Sub-Total	0	

Client 2 Reset	Monthly Amount	Stop or Start Date if any
Current Income:		
Job or Business		Stop:
Pension Income		Start:
Pension Income Survivorship: Check One 100% <input type="checkbox"/> 75% <input type="checkbox"/> 50% <input type="checkbox"/> 0% <input type="checkbox"/>	NA	NA
Social Security* Started or Expected		Start:
Monthly Withdrawal from Investments		Start: Stop:
Income from Other Source:		Start: Stop:
Income from Other Source:		Start: Stop:
Income from Other Source:		Start: Stop:
Sub-Total: Client 2	0	
Sub-Total: Client 1	0	
Total: Client 1 & 2	0	
Other Future Income or Assets	Value	Age/Year
Inheritance		Age: Year:
Sale of Business		Year:
Other Source:		Year:
Total	0	

* [Get Report at ssa.gov](http://ssa.gov)

REAL ESTATE

	Monthly Payment	Balance	Current Value & Interest Rate	Yrs. left to Pay
Residence Mortgage			0.000%	
Extra Principal		NA	NA	NA
Vacation Home Mortgage			0.000%	
Rental Home Mortgage			0.000%	
TOTAL	0	0	NA	NA

INSURANCE POLICIES

Do you want quotes on Life Insurance? Yes No

	Term or Cash Value	Death Benefit	Payment	Cash Surrender Value
Life Insurance				
Life Insurance				
Life Insurance				
Disability Insurance	Yes <input type="checkbox"/> No <input type="checkbox"/>	Mo. Benefit:		NA
Long Term Care	Yes <input type="checkbox"/> No <input type="checkbox"/>	Mo. Benefit:		NA
Concerned About Long Term Care?	Yes <input type="checkbox"/> No <input type="checkbox"/>	NA	NA	NA

DEBTS

	Monthly Payments	Balance Owed	# of Years Left
Auto 1: Own <input type="checkbox"/> Lease <input type="checkbox"/>			
Auto 2: Own <input type="checkbox"/> Lease <input type="checkbox"/>			
Credit Card Other			NA
Credit Card Other			NA
Credit Card Other			NA
Credit Card Other			NA
Home Equity Loan			
Boat Loan			
RV Loan			
Other Loan Type:			
Other Loan Type:			
TOTAL	0	NA	NA

MONTHLY EXPENSES

Monthly Expenses	Category	Monthly Amount
Housing	Mortgage Payments	
	Homeowners Insurance	
	Property Taxes	
	HOA Fees	
	Lawn Maintenance	
	Sub-Total	0
Utilities	Electric/Gas, Water, Cable, Internet, Telephone, etc.	
Personal	Groceries, Clothing etc.	
	Sub-Total	0
Health Care & Insurance	Health Insurance Premiums	
	Medicare Part B Premiums	
	Dental Insurance Premiums	
	Vision Insurance Premiums	
	Prescription Plan Premiums	
	Long Term Care Premiums	
	Life Insurance Premiums	0
	Disability Insurance Premiums	0
	Auto & RV Insurance Premiums	
	Other	
	Sub-Total	0
Transportation	Auto Fuel	
	Sub-Total	0
Recreation	Travel & Vacations	
	Hobbies	
	Dining Out	
	Sub-Total	0
Other Future Expenses		
Other Expenses		
	Sub-Total	0
Total Expenses	0	
Total Debt + Expenses	0	

MONTHLY SUMMARY TOTALS

INCOME	0
EXPENSES	0
NET	0

Additional Comments:

Warning: Pressing "Reset Total Form" Button will remove ALL entered information on this form

Reset Total Form