COMPREHENSIVE FINANCIAL GROUP INC.

Retirement Specialists since 1991

CONFIDENTIAL ANNUITY WORKSHEETS

Comprehensive Financial Group Inc. (CFGI)

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With over 34+ years of experience, our process is different than what you normally experience with a financial service company. Most brokers only focus on trying to get you higher rates of return, which increases your risk, and even if you lose money from market declines or crashes, they still get their fees.

Our focus is to help provide you with Retirement Income Planning and to ensure a safe, secure, and comfortable retirement, with a contractual guarantee of no market losses!

Our focus is to:

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

The ERODING FACTORS **Are:**

1. **Market Losses**
2. **Outliving Your Money**
3. **High Fees or Charges**

Our approach is a proven success and it allows our clients to sleep at night, knowing that we have the ability to create a plan that they will: never outlive their money, never experience market losses, and leave their proceeds to their beneficiaries, avoiding probate.

There are no fees or charges for our services. We are paid directly from the companies.
We believe in FINANCIAL EDUCATION**, so congratulations on taking the first step.**

Sincerely,
James R. Grazioli
President

PERSONAL INFORMATION - Reset

	Client 1	Client 2
Name		
Address		
City, State, Zip Code		
Phone Number		
Does this phone accept texts?	Yes ☐ No ☐	Yes ☐ No ☐
Email		
Date of Birth (Age)		

PLEASE USE APPROXIMATE WHOLE NUMBERS ON ALL SHEETS

SAVINGS & RETIREMENT PLANS

Assets	Client 1 Reset Current Value	Client 2 Reset Current Value
Checking		
Savings		
Money Market		
CD's		
Non-IRA Brokerage Accounts		
IRA Brokerage Accounts		
401(k) still working there?	☐	☐
403(b) still working there?	☐	☐
Annuities Total Value - IRA		
Annuities Total Value - Non-IRA		
Other Investments:		
Other Investments:		
TOTAL	0	0

MONTHLY INCOME

Client 1 Reset

Current Income:	Monthly Amount	Stop or Start Date if any	
Job or Business		Stop:	
Pension Income		Start:	
☐ ☐ ☐ ☐			
Social Security* Started or Expected		Start:	
Current Monthly Withdrawals from Investments		Start:	Stop:
Income from Other Source:		Start:	Stop:
Sub-Total	0		

Client 2 Reset

Current Income:	Monthly Amount	Stop or Start Date if any	
Job or Business		Stop:	
Pension Income		Start:	
☐ ☐ ☐ ☐			
Social Security* Started or Expected		Start:	
Current Monthly Withdrawals from Investments		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]

REAL ESTATE

	Monthly Payment	Balance	Current Value & Interest Rate	Yrs. left to Pay
Home 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

	Term or Cash Value	Death Benefit	Monthly Payment	Cash Surrender Value
Life Insurance-				
Life Insurance -				
Life Insurance				
Disability Insurance	**Yes** ☐ **No** ☐	**Mo. Benefit:**		**NA**
Long Term Care	**Yes** ☐ **No** ☐	**Mo. Benefit:**		**NA**
Concerned About Long Term Care?	**Yes** ☐ **No** ☐	**NA**	**NA**	**NA**

DEBTS

	Monthly Payments	Balance Owed	# of Years Left
Auto 1: Own ☐ **Lease** ☐			
Auto 2: Own ☐ **Lease** ☐			
Credit Card Other			**NA**
Credit Card Other			**NA**
Home Equity Loan			
Boat Loan			
RV Loan			
Other Loan Type:			
TOTAL	0	**NA**	**NA**

MONTHLY EXPENSES

Monthly Expenses	Category	Monthly Amount
Housing	Mortgage Payments + Extra Principal	
	Homeowners Insurance	
	Property Taxes	
	HOA Fees	
	Storage or 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
Monthly Business Expenses		
Other Expenses		
	Sub-Total	0
Total Expenses	0	
Total Debt + Expenses	0	

MONTHLY SUMMARY TOTALS

INCOME	0
EXPENSES	0
NET EXCESS OR LOSS	0

Additional Comments:

Print Form

Reset Total Form