Financial Information

Annual Income:

Yours		Spouse
❑	$50,000 and Under	❑
❑	$50,001 - $100,000	❑
❑	$100,001 - $175,000	❑
❑	$175,001 - $250,000	❑
❑	Over $250,000	❑

Total Life Insurance:

Yours		Spouse
❑	$100,000 and Under	❑
❑	$100,001 - $250,000	❑
❑	$250,001 - $500,000	❑
❑	$500,001 - $1,000,000	❑
❑	Over $1,000,000	❑

Mortgage: Balance: $__________ Interest Rate:_____%

Original Mortgage Term: _____ Term (Years)

Years Remaining: _____

Future Planning

In the near future I expect to:

Occupational	Personal	Financial
❑ Graduate	❑ Have a child	❑ Receive a raise or bonus
❑ Change job	❑ Adopt a child	❑ Have a CD mature
❑ Start a business	❑ Improve home	❑ Receive inheritance
❑ Receive a promotion	❑ Buy a home	❑ Borrow money
❑ Retire	❑ Care for parent	❑ Pay off a loan
	❑ Change marital status	❑ Purchase property
	❑ Become an empty nester	

AIG

Not a deposit | Not insured by any federal government agency | May loose value | No bank or credit union guarantee | Not FDIC/NCUA/NCUSIF insured

AGLC111319

AIG

AIG Life & Retirement now
corebridge financial

A PERSONAL & CONFIDENTIAL CHECKUP

Family Information

Name: ______________________________

Are you a US citizen? ☐ Yes ☐ No

If no, what type of visa do you have? ______________

Birthdate: ______________ Tobacco User: ☐ Yes ☐ No

Spouse's Name: ______________________________

Birthdate: ______________ Tobacco User: ☐ Yes ☐ No

Children: ______________ Age: ________

______________ ________

______________ ________

______________ ________

Home Address: ______________________________

____

☐ Own Home ☐ Rent ☐ Other

Email: ______________________________

Daytime Phone: ______________________________

Evening Phone: ______________________________

Cell Phone: ______________________________

Occupation: ______________________________

Spouse's Occupation: ______________________________

My Feelings, Concerns & Goals

Please check what fits you best.:

VI Very Important, SI Somewhat Important, NI Not Important, NA Not Applicable

	VI	SI	NI	NA
1. Providing college funds for children is				
2. Paying off my home mortgage early to save thousands of dollars is				
3. Retirement planning is				
4. Insurance on myself, my spouse and children is				
5. Access to cash while living to help with unexpected medical expenses is				
6. If I became ill and was unable to work, a lump sum disability benefit would be				
7. Paying off my debts in the event of my death is				
8. Allowing my family to maintain their current lifestyle in the event of my death is				
9. Leaving a legacy for my loved ones is				
10. Receiving help with my overall planning is				

Overall Planning

Please check what fits you best.:

	Yes	No	Don't Know
1. I have a current and valid will			
2. I have appointed a guardian for my children			
3. I keep my important papers in a safe or safe deposit box			
4. My family knows the location of my important papers			
5. I do a good job managing my income/expense flow			
6. I participate in a pension/profit sharing plan or 401K			
7. I am satisfied with the amount of money I have accumulated for my financial security			
8. I am aware of the financial impact a major illness could have on my family			
9. I have checked my Social Security benefits in the past 12 months			
10. I have accurately calculated the amount of money I need during my retirement years			