

# ROSENBERG FINANCIAL GROUP, INC

2517 Moody Road, Suite 100, Warner Robins, GA 31088 ~ 922-8100  
 4875 Riverside Drive, Suite 201, Macon, GA 31201 ~ 741-5547

## FINANCIAL PLANNING WORKSHEET

File: 10/2015

Date:
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Name:	DOB:
Spouse:	DOB:
Address:	Home #:
	Cell #:
	Other:
	e-mail:

<b>AMOUNTS IN BANKS AND CREDIT UNIONS (NON-RETIREMENT)</b>			
(i.e. CDs, Checking, Savings, Money Market, etc...)			
	Where Account is Held (Bank, Brokerage, Employer)	Type Account	Approximate Balance
1			
2			
3			
4			
5			
6			
7			
8			
<b>Sub Total</b>			\$0.00

<b>Retirement Accounts (i.e. IRA's 401k, TSA, TSP, etc...)</b>			
(i.e. IRA's 401k, TSA, TSP, etc...)			
	Where Account is Held (Bank, Brokerage, Employer)	Type Account	Approximate Balance
1			
2			
3			
4			
5			
6			
7			
<b>Sub Total</b>			\$0.00

<b>Mutual Funds, Annuities &amp; Brokerage Accounts</b>			
	Where Account is Held (Bank, Brokerage, Employer)	Type Account	Approximate Balance
1			
2			
3			
4			
5			
6			
7			
<b>Sub Total</b>			\$0.00

