

TOURKOW, CRELL, ROSENBLATT & JOHNSTON
INITIAL INTAKE SHEET

Full Legal Name: _____

Date of Birth: _____ Social Security Number: _____

Current Address: _____

City _____ State _____ Zip _____

County of Residence: _____

Telephone: (Home) _____ (Work) _____ (Cell) _____

Email Address: _____

Full Legal Name of Spouse: _____

Date of Birth: _____ Social Security Number: _____

Assets (What You Own): **Dollar Value:**

Cash..... _____

Checking Accounts _____

Savings Accounts _____

Money Market Accounts _____

Certificates of Deposit _____

Cash Value of Life Insurance Policies _____

Retirement Plans _____

Pension/Profit Sharing Plans _____

IRAs _____

401(k) Plans/Thrift Savings Plans (TSP) _____

SEP – IRA/Simple IRA _____

Keogh Plans _____

Money Owed to You _____

Stocks/Bonds _____

Mutual Funds _____

Real Estate Investments _____

Other Investments (List Below)

- 1) _____
- 2) _____
- 3) _____

- Your Home
- Rental or Vacation Property
- Vehicles
-
- Furniture/Appliances
- Jewelry/Furs
- Collectibles/Artwork
- Miscellaneous Property
- Other

Liabilities (What You Owe): **Total Debt** **Monthly Amount**

- Mortgages
- Vacation Home Mortgages
- Personal Loans
- Vehicle Loans (Enter Lender Name)
- 1) _____
- 2) _____
- Credit Card Balances
- Education Loans
- Investment Loans
- Life Insurance
- Other

Annual Income for Wage Earners: **Husband** **Wife**

- Wages
- Interest and Dividends
- Investment Income

Social Security	_____	_____
Retirement Plans	_____	_____
Unemployment Compensation	_____	_____
Other Income	_____	_____