The Gibraltar Group
INSURANCE SERVICES

FOR LIFE'S BIGGEST DECISIONS.

FINANCIAL FUTURE PLANNER

THE GIBRALTAR GROUP

ADDRESS
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HOUSTON, TX 77056

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Welcome to our Financial Planner

Tell us what you need to protect and we will find the right policy for you. Your life is wonderful, crazy and completely your own, and we want you to protect you and those you love through every step of this adventure. Just by talking with us, we will help you truly understand and learn about how insurance can be customized to fit your exact needs, created for you, by you. You'll be ready to have the independence that goes further but all while knowing you have the Gibraltar Insurance team by your side the whole way.

We wish to thank you for considering The Gibraltar Group for your financial needs. Our goal will be to introduce you to the valuable service and knowledge that is only obtained through decades of experience. We administer ROTH IRA's, life insurance, financial services and principal protected, tax advantaged investments. We have products with above average interest rates that will allow you to get the most of your money. We are excited to go on this journey with you!

General Information

Your Information

Name:

Address:

City: Zip:

State:

Phone: Mobile:

Fax: Email:

Agent Information

Name:

Position:

Phone: Mobile:

Fax: Email:

Financial Planning

Financial Planner

Who is the most important person in your life?

What do you value most in your life?

What would you like most to achieve in life?

Are there children with special needs or circumstances to plan for?
☐ yes ☐ no

What are your goals for the distribution of your assets after you are gone? Do you have a will?

What or how do you feel when the value drops on your investments?
(On a scale of 1-10: 1 being least valued, 10 being most valued)

How do you feel or what do you think about the interest rate the bank is paying on your bank products?

Financial Planning

Do you ever think about or worry about living longer than your money might last?

How important is it to you to provide an inheritance to your children?
(On a scale of 1-10: 1 being least valued, 10 being most valued)

Would you like to reduce the amount
of taxes on your estate leaving more to your loved ones?

Are you concerned about inflation?
☐ yes ☐ no

Do you have a special relationship with your banker or broker?
☐ yes ☐ no

What do you feel is a fair interest rate on your investments?

What is your goal for retirement funds?
Income now? Growth now? Income Later?

What age do plan on needing income?

Priority Issues

Check what matters to you:

- ☐ I want to protect my principal
- ☐ Eliminate losses due to stock markets drops
- ☐ I want to reduce or eliminate my risk exposure
- ☐ I want a better rate of return on my CD's or Money Market accounts
- ☐ Locking in my gains

Income Information

Employment Income	$	Annuity Income	$
Social Security Income	$	Interest Income	$
Pensions	$	Dividend Income	$
IRA Income	$	Rental Income	$
Other Income	$	Spouse Income	$
Total monthly Income	$	Monthly Expenses	$
Total Household Monthly Income	$	Total Excess Income	$

Financial Planning

Life Insurance Inventory

Company:

Type: Face Amount:

Cash Value: Premium:

Company:

Type: Face Amount:

Cash Value: Premium:

Company:

Type: Face Amount:

Cash Value: Premium:

Company:

Type: Face Amount:

Cash Value: Premium:

Personal Preference Information

Do you feel that your income is adequate to meet your current needs?
☐ yes ☐ no

If no, how much more monthly income do you feel is needed?

How comfortable are you with risk?
(On a scale of 1-10: 1 being least valued, 10 being most valued)

What are your general feelings about investing?

Investing

		Maturity Date
1. How much invested in CD's	$	
2. Money Markets	$	
3. Savings Accounts	$	
4. Checking Accounts	$	
5. IRA's	$	
6. Annuities	$	

Protect my principal from losses?

Track my gains annually? ☐ Concerns about outliving my money? ☐


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