

MGB Equity Analysis

Independent agent of UFF #878499

Phone No: 800-221-0717 Ext 222/ Fax no: 562-481-3768

Email: MGBequity@verizon.net / www.MGBequity.com

FINANCIAL ANALYSIS

Name:

Date:

INCOME

TOTALS	\$ -

LIABILITIES

House Loan % 6.25	
Equity Credit Line	\$ -
Car loans	\$ -
Credit Card 1	\$ -
Credit Card 2	\$ -
Credit Card 3	\$ -
TOTALS	\$ -

Life Insurance:	
Life Insurance:	
Annuity	\$ -
Trusts	\$ -
Wills	\$ -

ASSETS

401 K	
IRAs SEP	
Roth IRA's	
House	
Cars	
Savings	
Checking Acct	
CD's	
Other	
TOTALS	\$ -

RETIREMENT INCOME

Social Security	
Pension	
401K	
Annuity	
Julie SS	
TOTALS	\$ -

RETIREMENT % OF INCOME

80%	\$ -
75%	\$ -
65%	\$ -

EXPENSES

Mortgage	
Car payments	
Car Lease	
Car Licenses	
HELOC/2nd mortga	
Car Insurance	
Car Maintenance	
Life Insurance	
Home Insurance	
Medicine	
Credit card	
Credit Card	
Credit Card	
Groceries	
Electricity	
Gas	
Fuel	
Phone	
Cells	
Dining out	
Lunch	
Entertainment	
College	
Home services	
Clothing	
Water	
Cable TV	
Misc	
DSL	
Property Taxes	
TOTALS	\$ -

GOALS

RETIREMENT EXPENSES

\$ -
\$ -
\$ -

Initial here _____