

# THE WEALTH CURVE MINDSET MAXIMIZER



**SMALLWOOD**  
WEALTH MANAGEMENT

General Information		
	Client	Co-Client
First Name		
Last Name		
Date of Birth		
Age		
Annual Income		
Total Income		
Business Owner	YES / NO	YES / NO
Child D.O.B		
Child 2 D.O.B		
Child 3 D.O.B		
Child 4 D.O.B		

MAX Cash Reserve			
	Maximum	Now	Goal
MAX Cash Reserve 50%			

MAX Umbrella		
Maximum	Now	Goal

MAX Disability Income Protection 65% of Income			
	Current Monthly Amount	Maximum	Goal
Group			
Personal			

MAX Will			
Will	Trust	Advanced Health Care Directive	Durable Power of Attorney

Future Financial Pressure			
Goal	Time Frame (years to goal)	Amount	Goal Amount

Savings Rate				
	Monthly Amount	Maximum	Now	Goal
Savings Account				
Permanent Life Insurance				
Retirement				
Non-Qualified				
Other				
Total				

MAX House Mortgage 25% of Gross			
	Current Monthly Amount	Maximum	Goal
Principal			
Interest			
Escrow/Tax			
Total			

Max Life Insurance			
	Maximum	Now	Goal
Term			
Permanent Life Insurance			

Max Long Term Care			
	Maximum	Now	Goal
Long Term Care			

Max Lifestyle 40% of Gross			
	Current Monthly Amount	Now	Goal
Lifestyle 40% Gross			

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