





# PowerDownDebt, Inc.

384 Montague City Road  
Montague City, MA 01376

Phone: 413-774-5555

Fax: 866-733-4057



Name: \_\_\_\_\_ Date \_\_\_\_\_

## Estimated Assets

<u>Type of Investment Account</u> <small>Please use second sheet if necessary</small>	<u>Estimated Balance</u>	<u>Interest Rate</u>	<u>Maturity Date if applicable</u>	<u>Notes</u>
<u>Emergency Cash Reserves</u> <u>(Savings account)</u>				
<u>Certificate(s) of Deposit</u>				
<u>Annuities</u>				
<u>Stocks</u>				
<u>Bonds</u>				
<u>Money Market</u>				
<u>401k, 403b, 457 plan</u>				
<u>IRA</u>				
<u>Deferred Compensation</u>				
<u>Other</u>				

## Life Insurance

<u>Type of Policy</u> <small>ie. Term, Whole Life</small>	<u>Death Benefit</u>	<u>Cash Value</u>	<u>Annual Premium</u>	<u>Person Covered</u>

This information is extremely helpful in understanding your financial situation comprehensively. It may allow us to lower payments, correct deficiencies, and increase investment efficiency.

All information provided will be kept in strict confidence. Thank you for providing it.