



# Integrated Planning Periodic Update

Client Household Name: \_\_\_\_\_

Meeting Date: \_\_\_\_\_

## Fiscal Fitness Update

Household Income Sources:  
(e.g., Earned Income, Pension,  
Real Estate, SSI, etc.)

(if not receiving SSI or Pension, please check full retirement age amount)

Household Expenses

New Periodic or Planned Expenses

Total Aggregate Cash Balances  
(total outside of investment accounts)

Set Savings & Retirement Plan  
Contributions

Current

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

## iPlan Use:

### Account Feeds

Do you have outside accounts feeding into iPlan?  Y  N

If yes, please have your login credentials available for your meeting. **If not, please provide balances below for held away assets:** Retirement accounts: \_\_\_\_\_

Taxable Accounts: \_\_\_\_\_

### Document Vault

Last Tax Return Year on File: \_\_\_\_\_ Estate Docs on File:  Y  N

**Please feel free to bring other items for us to add to your Vault**

## Other Planning Updates

- |   |  |  |
|---|--|--|
| <input type="checkbox"/> Home Sale/<br>Purchase               | <input type="checkbox"/> Change to Retirement<br>Date/Status | <input type="checkbox"/> Adjustment to Estate Docs/<br>Beneficiaries |
| <input type="checkbox"/> Job Change                           | <input type="checkbox"/> Business Sale                       | <input type="checkbox"/> New Insurance Policy                        |
| <input type="checkbox"/> Home Refinance<br>(Refi, Rev. Mort.) | <input type="checkbox"/> Stock Options                       | <input type="checkbox"/> Employee Benefit Options                    |
| <input type="checkbox"/> Marriage/Divorce                     | <input type="checkbox"/> Birth of Child/Grandchild           | <input type="checkbox"/> Other: _____                                |

**Please come to your meeting with financial parameters  
for any of these life events.**

Other Concerns you wish to discuss today:

\_\_\_\_\_  
\_\_\_\_\_

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