

CAPITAL

WEALTH INVESTMENTS

ZULLO INVESTMENT GROUP

132 Adams Avenue | Scranton, PA 18503 | 570.543.5255

Investment advisory services offered through Bernardo Wealth Planning, LLC dba Capital Wealth Investments, an SEC registered investment adviser.

FA:	<u> </u>			Age	ncy:			Date):		
Client Name	e:	SEC. 100 / 10		Den No	DOB:		IIC	Citizen:	Y	N	NIZ-U-
Spouse Nan	ne:			No.	DOB:			Citizen:		N	Mark Editor
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Family Dat	a:										
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Investments Type/Institut Name		Curret	nt Value	Tax	x Basis	Pre-Retire Gross Growth	Post-Retir Gross Gro	e	Owne		
Retirement: Type/ nstitution Name	Curre		Pre-Retire Gross Growth		Post-Retire Gross Growth	Owner	Beneficiary	Emple Contr	Dyee		mployer ontribution

Business Nam	e Ba	ase Value	Ta	x Basis	Pre-Retire Gross Growth	Post-Retire Gross Growth	Owner		Business Type
Incorporate			<u> </u>	···					
Insurance:		Life 1 Life		2		Long Term	Care	Disabil	ity
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Policy Type		December 5	1500	I	nsured	in the second	710.00	304.14	
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Death Benefit			West of		remium Term	M MANY SECURITY			
Cash Value			Name of the Party	Premium Payer				STATE OF THE	
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Does your Ins	urance cont	inue to fill a	need?						
Do you work	closely with	a life insura	nce ag	ent?					
Do you work									
Liability:	- L		T .					concellated a	N) and all of the last of the
Mortgage/Loa	ins Instit	tution Name	Cui	rent Balance	As of Date	Interest	Rate	Loa	n Term
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Expenses:									
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Projections are based on assumptions provided by the advisor representative, and are not guaranteed. Actual results will vary, perhaps to a significant de-	gree. The projected reports are
hypothetical in nature and for illustrative purposes only. Consult your tax and or legal advisor before implementing any tax or legal strategies.	
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Current Estate Plans:

	Simple Will	RLT	Funded	Gifts	ILIT	FLP	CLT	CRT	Bus. Succession	Other
Client										
Spouse										

Attorney/CPA Questions:

Do you have an Estate Planning Attorney? Y N	4	Would you like us to recommend someone? Y N	
Is your Attorney a key decision maker for you?	Y N	Is your CPA a key decision maker for you? Y N	

Personal Ouestions:

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Do you feel you have achieved financial security through retirement? Y N
Do you have any potential inheritances? Y N
How would you like to pass your estate?
Do you plan to leave any portion of your estate to charity? Y N
Do you need to make any special financial provisions for any member of your family? Y N Who?
What are your plans to deal with Estate Taxes?
What is your largest obstacle in achieving your goals?
Are you willing to invest effort/money, if plan serves to reduce/eliminate tax? Y N
Financial Risk Tolerance: Conservative Moderate Aggressive