



## Elevated Retirement Group

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NAME \_\_\_\_\_ DATE \_\_\_\_\_

### 1. DEBTS YOU OWE:

Debt Name	Amount of Debt	Payment you Make	Minimum Payment Due	Interest Rate
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

### 2. MONEY YOU SAVE:

**Saving  
Accounts**

\$ \_\_\_\_\_ / Month

**401 (k)  
Contribution**

Your contribution amount \_\_\_\_\_ or % \_\_\_\_\_

Matching contribution amount % \_\_\_\_\_

**Other Accounts**

\_\_\_\_\_ \$ \_\_\_\_\_ / Month

\_\_\_\_\_ \$ \_\_\_\_\_ / Month

\_\_\_\_\_ \$ \_\_\_\_\_ / Month

\_\_\_\_\_ \$ \_\_\_\_\_ / Month