



Name: _____ DOB: _____
Spouse: _____ DOB: _____
Dependent Children-Ages: _____, _____, _____, _____, _____
Spouse Employer: _____ Are you planning to leave a survivor benefit? _____

JOB DATA

Agency, Location & Position: _____
Salary: _____ Service Comp Date: _____
Does SCD include military time? _____ Dates in Military: _____
Did you buy time? _____ Sick leave hours: _____
CSRS: _____ FERS: _____ Transfer Date: _____
Basic FEGLI: ☐ Yes ☐ No
Optional FEGLI: Option A: ☐ Yes ☐ No (Additional 10,000)
Option B: ☐ Yes ☐ No (____X's) (1 to 5 times your salary)
Option C: ☐ Yes ☐ No (____X's) (Family - 1 to 5 times)
Approximate Retirement Age: _____
Do you contribute to thrift? ☐ Yes ☐ No (Amount ____%) C ____ F ____ G ____ S ____ I ____ L ____
If using L funds, which one and what percentage? _____
Approximate Traditional Balance: _____ Approximate Roth Balance: _____

Personal Life Insurance Amount	Company Name	Cost

P 605.882.3680 | F 413.513.2421
403 10th Street NW | Watertown, SD 57201

MFSERVICESINC.COM

Millennium Financial Services, Inc. (MFS) is an independent financial services firm that utilizes a variety of investment and insurance products. Insurance products are offered through the insurance business MFS. MFS is also an investment advisory practice that offers products and services through AE Wealth Management, LLC (AEWM), a registered investment adviser. AEWM does not offer insurance products. The insurance products offered by MFS are not subject to investment adviser requirements. AEWM and MFS are not affiliated with the U.S. government or any governmental agency. 02860145-02/25





SCHEDULED MEETING

Best Time: _____ Date: _____ Will spouse be available to review analyst? ☐ Yes ☐ No
Home Phone: _____ Work Phone: _____ Cell Phone: _____
Home Address: _____
Mailing Address (if different from above address): _____
Email Address: _____
What is your biggest concern? _____
What do you hope to accomplish during this meeting? _____

Comments:

P 605.882.3680 | F 413.513.2421
403 10th Street NW | Watertown, SD 57201

MFSERVICESINC.COM

Millennium Financial Services, Inc. (MFS) is an independent financial services firm that utilizes a variety of investment and insurance products. Insurance products are offered through the insurance business MFS. MFS is also an investment advisory practice that offers products and services through AE Wealth Management, LLC (AEWM), a registered investment adviser. AEWM does not offer insurance products. The insurance products offered by MFS are not subject to investment adviser requirements. AEWM and MFS are not affiliated with the U.S. government or any governmental agency. 02860145-02/25

