PRELIMINARY INFORMATION - WEALTH REPORT

Please complete the following questionnaire to your best ability. This will help us provide the most accurate and comprehensive wealth report for you and your family.

I. CLIENT DETAILS

Name: ______________________ Date of Birth: ______________

Spouse: ______________________ Date of Birth: ______________

Phone: ______________________ Email: ______________________

II. INCOME (COMPLETE AS APPLICABLE)

Salary (Gross) : ______________________ Self-Employed (Net): ______________________

Social Security*: ______________________ Pension: ______________________

Investment Income: ______________________ RMD's: ______________________

Rental Income: ______________________ Other Income: ______________________

How many years do you want to work: ______________________

How much money do you need to live on each month? ______________________

* Please provide current Social Security Benefit Statement (if not yet taking Social Security).

III. MORTGAGE (COMPLETE AS APPLICABLE)

Current Balance: ______________________ Interest Rate: ______________________

Home Value: ______________________ Monthly Payment*: ______________________

* Not including taxes or insurance.

IV. ASSETS (COMPLETE AS APPLICABLE)

Cash: ______________________ IRA's*: ______________________

401(k): ______________________ Company match? If so, how much? ______________

Life Insurance*: ______________________ Annuities*: ______________________

* Please provide a current statement.

V. FUTURE EXPENSES IN THE NEXT 1-5 YEARS (NEW CAR, WEDDING, HOME, REMODELING, ETC.)

Individual	Description Event	Anticipated Cost/Value	Expected Event Age
		$	
		$	
		$	

VI. ADDITIONAL COMMENTS

What are the most important financial goals that you would like to accomplish? Please prioritize.

1.) ______________________________

2.) ______________________________

3.) ______________________________

4.) ______________________________

If you were going to change anything in your financial situation, what would it be?

____

____

If we were meeting here three years from today, what has to have happened for you to feel happy with your progress?

____

____

We have been able to grow substantially through the power of referrals. If we fulfill your expectations, what method of communication may we talk to you about obtaining referrals that is most comfortable for you?

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Will there be any other advisors involved in the decision making process?

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