

H U b _ n e i ` z f ` m c i f ` j b h y f Y g h] b ` U ` c k] b [` i g ` l c ` U g g] g h n e i ` j b ` m c i f ` z] b U b W j U ` [c U g ` ` D ` Y U g Y W e a d ` Y h Y ` h Y z ` ` c k] b [` W Y W `] g h g c ` h U i k Y W U b ` V Y h Y f ` U X X f Y g g ` n e i f ` z] b U b W j U ` W e b W f b g ` d f] c f ` l c ` c i f `] b] h U ` W e b g i ` h U j c b ` `

DYfgcbU`-bZfa Ujcb`

First Name _____
Last Name _____
Nickname _____
Date of Birth _____ / _____ / _____
Phone(_____) _____
Email _____

Spouse Name _____
Last Name _____
Nickname _____
Date of Birth _____ / _____ / _____
Phone(_____) _____
Email _____

Dependents/Children

Name _____	Age _____
Name _____	Age _____
Name _____	Age _____

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What financial concerns cause you to seek financial planning assistance?

When do you want to retire? _____

What are your major financial goals? _____

Do you have any special circumstances which worry you? _____

9 ghUy`D`Ubb]b[- Do you have any of the following:

A current will? _____ When was it signed? _____
Durable Power of Attorney: _____ Medical Power of Attorney: _____
Living Will/Medical Directive: _____
Trust? If so what kind(s)? _____

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% * \$+ `GUb`DYXfc`5 j Ybi YZGi]hY`% \$` GUb`5 brcb]cZHL`+, & `&` k k k `ZUXj] gcf g'Wta `

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Risk Management

Do you have blanket ("umbrella") liability insurance? _____
Do you have disability insurance? _____ Through work? _____
Do you have life insurance? _____ How much? _____
What kind(s)? _____
Do you have long-term care insurance? _____

Financial Status

Annual Household Income

_____ \$75,000 and under _____ \$75,000 - \$100,000 _____ \$100,000 - 250,000
_____ \$250,000 - \$500,000 _____ \$500,000 - \$1,000,000 _____ \$1,000,000 and up

Approximate Net Worth (*net worth = total assets (not including home and automobile) less total debts)
\$ _____

Have you filed for Social Security? _____ If so, at what age(s)? _____

Are you eligible for any pensions? _____

If so, how much and when are you eligible? _____

Asset & Debt Information

Asset Type (Combined)	Current Value	Asset Type (Combined)	Current Value
_____	\$ _____	_____	\$ _____
_____	\$ _____	_____	\$ _____
_____	\$ _____	_____	\$ _____
_____	\$ _____	_____	\$ _____
_____	\$ _____	_____	\$ _____

Debts	Current Value	Loan Amount	Interest Rate	Payment
_____	\$ _____	\$ _____	% _____	\$ _____
_____	\$ _____	\$ _____	% _____	\$ _____
_____	\$ _____	\$ _____	% _____	\$ _____
_____	\$ _____	\$ _____	% _____	\$ _____
_____	\$ _____	\$ _____	% _____	\$ _____
_____	\$ _____	\$ _____	% _____	\$ _____

Were you referred by someone? _____

If not, how did you hear about us? _____

Today's Date _____ / _____ / _____

Additional information that may be needed. It is recommended to bring this information if readily available:

- Copy of prior year tax return
- Bank statements and/or financial portfolio
- Insurance policies
- Social Security and/or pension statements
- Copy of valid driver's license
- Estate planning documents
(will, trusts, etc, if applicable)