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**Client Questionnaire**

This is about you, your money, and the life that you want to live. Money and numbers are very important, however what you want and being clear about that is also critical to the process. Answer what you can throughout this questionnaire and call me should you have any questions. We will both/all learn a lot as we develop your plan.

1. **Family information**
   1. You *(Name as it appears legally, date of birth)*
   2. Spouse *(Name as it appears legally, date of birth)*
   3. Children *(Name as it appears legally, date of birth)*
      1. Oldest:
      2. Next:
      3. Next:
      4. Next:
      5. Next:
2. **What you want…..and when you want it**
   1. What would you like us to accomplish in the next three years?
   2. Personal Goals *(What you want for your life.)*

* Family
* Home Environment
* Hobbies/Pursuits
* Personal Development
  1. Career Goals *(What you want for your work.)*
* How long do you wish to continue to work?
* Position sought / aspirations
* Change of career
* What is required of you to achieve this?
  1. Financial Goals (What you want your finances to be.)
* Zero credit card balance?
* Balanced budget?
* Funded emergency fund?
* Home purchase / remodel?
* Education for others / yourself?
* Assistance for others?
* Dreams?







* What does Financial Independence mean to you?
  1. Retirement Goals
* Desired age to retire:
* Income for retirement *(In today’s dollars, how much would you like to have per month to live?)*:

1. **Money that you expect to receive regularly, now or in the future**
   1. Your Salary and Bonus
   2. Royalties
   3. Social Security
   4. Future Pensions
   5. Alimony
   6. Insurance benefits
   7. Other
2. **What things of value do you own that will help you achieve what you have listed above?** *(Indicate the company where it is held with & the current value. If a statement is available, that would be very helpful!)*

|  |  |
| --- | --- |
| Checking Accounts | 1. |
| 2. |
| Savings Accounts | 1. |
| 2. |
| Money Market Funds | 1. |
| 2. |
| US Savings Bonds |  |
| CD’s |  |
| Treasury Bills |  |
| Notes, bonds and other “fixed” investments |  |
| Individual Stocks |  |
| Mutual Funds |  |
| Variable or Indexed Annuities |  |
| Direct Investment Interests (REITs or Limited Partnerships) |  |
| Life Insurance With Cash Values |  |
| IRA’s |  |
| Company Retirement Plans |  |
| Stock Options |  |
| Deferred Compensation Plans |  |
| Inheritance You Expect |  |
| Interest In A Trust Set Up By Someone Else |  |
| Business You Own (Net value) |  |
| Your Home’s Market Value |  |
| Investment Real Estate |  |

1. **What do you owe**
   1. Credit card balances not paid off at month end
   2. Car loans
   3. Other consumer loans
   4. Personal notes owed
   5. Mortgages
   6. Equity lines of credit
   7. Other debt
2. **Experiences**
   1. Best financial experience
   2. Worst financial experience
3. **Any other information that you feel you would like me to keep in mind to help you plan?**