—— Introductory ——

QUESTIONNAIRE

INTRODUCTORY QUESTIONNAIRE

Please complete by filling in your information below.

FAMILY INFORMATION

Name:			Name:		
Date of Birth:			Date of Birth:		
How many children do you have?			Age(s) of children:		
Parents:			Spouse Parents:		
Do they have special needs?	Yes	No	Do they have special needs?	Yes	No
Are they in good health?	Yes	No	Are they in good health?	Yes	No
Are they financially dependent?	Yes	No	Are they financially dependent?	Yes	No

INCOME & ANNUAL SAVINGS

Salary:	Spouse Salary:
Other Income:	Spouse Other Income:
Savings (Qualified):	Savings (Qualified):
Savings (Non-Qualified):	Savings (Non-Qualified):

ASSETS

	JOINT:	CLIENT:	SPOUSE:
Real Estate/Property	$	$	$
Retirement Investments (IRA, 401(k) etc.)	$	$	$
Personal Investments	$	$	$
Other Investments	$	$	$
Business Interests	$	$	$

SHORT TERM (36 mo.) CASH NEEDS

Weddings:	$
Purchase of Property:	$
Education:	$
Misc.:	$

LIABILITIES

	JOINT:	CLIENT:	SPOUSE:
Total Mortgage Debt:	$	$	$
Total Credit Card Debt:	$	$	$
All Other Debt:	$	$	$

LIFE INSURANCE

ON CLIENT LIFE:

Death Benefit $

ON SPOUSE LIFE:

Death Benefit $

PRIORITIZE YOUR GOALS

CLIENT - Rank your top 6 goals from 1-6

- ☐ Planning for Retirement
- ☐ Saving for College
- ☐ Managing a Budget
- ☐ Minimizing Taxes
- ☐ Insuring Your Income
- ☐ Providing a Legacy
- ☐ Contributing to Charity
- ☐ Creating Retirement Income
- ☐ Saving for Major Purchase
- ☐ Maximizing Investments
- ☐ Insuring Your Life
- ☐ Insuring Your Assets
- ☐ Caring for Parents
- ☐ Planning for a Business

SPOUSE - Rank your top 6 goals from 1-6

- ☐ Planning for Retirement
- ☐ Saving for College
- ☐ Managing a Budget
- ☐ Minimizing Taxes
- ☐ Insuring Your Income
- ☐ Providing a Legacy
- ☐ Contributing to Charity
- ☐ Creating Retirement Income
- ☐ Saving for Major Purchase
- ☐ Maximizing Investments
- ☐ Insuring Your Life
- ☐ Insuring Your Assets
- ☐ Caring for Parents
- ☐ Planning for a Business

RETIREMENT ASSUMPTIONS

Current Living Expenses:

Retirement Living Expenses:

Desired age of Retirement (Client):

Desired age of Retirement (Spouse):

MISC. ASSUMPTIONS

Are you expecting any large lump sum payment in the future? (E.g. Sale of business, Inheritance, etc.)

Year:

Amount:

ADDITIONAL REMARKS

Is there any information you would like us to know which was not covered in this questionnaire?