



New Client Questionnaire

Our objective is to help you better understand your financial position by adding valuable analysis and insight on your path to reaching your goals. To make the most of our time together, it would be helpful to know more about you and your unique circumstances. Please complete as much as possible, ***all information provided is confidential.***

Name: _____ Age: _____

Cell Phone: _____ Email Address: _____

Address: _____

City: _____ State: _____ Zip: _____

Currently Employed? ☐ Yes ☐ No If yes, Employer Name: _____

Job Title: _____ Annual Income: _____

Other Income (Social Security, rental, royalties, etc.): _____ Monthly Savings Goal: _____

Spouse's Name: _____ Age: _____

Cell Phone: _____ Email Address: _____

Currently Employed? ☐ Yes ☐ No If yes, Employer Name: _____

Job Title: _____ Annual Income: _____

Other Income (Social Security, rental, royalties, etc.): _____ Monthly Savings Goal: _____

Who else are you financially responsible for (e.g., kids, grandkids, aging parents, etc.)?

Name	Age	Gender	Dependent	Relationship
_____	_____	☐ M ☐ F	☐ Yes ☐ No	_____
_____	_____	☐ M ☐ F	☐ Yes ☐ No	_____
_____	_____	☐ M ☐ F	☐ Yes ☐ No	_____
_____	_____	☐ M ☐ F	☐ Yes ☐ No	_____

What financial goals or concerns are currently your top priorities?

What do you hope to achieve from your relationship with a financial planning team?

Are there any challenges/reasons that may have prevented you from achieving your financial goals in the past?

Current Net Worth:

Assets:

Cash: \$ _____

Investments (401k, IRA, Brokerage, etc.): \$ _____

Real Estate: \$ _____

Other Assets: \$ _____

Total Assets: \$ _____

Liabilities:

Mortgage: \$ _____

Credit Cards: \$ _____

Other Liabilities: \$ _____

Total Liabilities: \$ _____

Net Worth (Assets – Liabilities): \$ _____

What other information would you like us to know about you prior to our meeting?

Please return your completed form to us so we can schedule a follow-up meeting with you. We look forward to connecting with you soon!