Capital Investment *Advisors*

Financial Planning Pre-Meeting Questionnaire

Where Have You Seen Us? (Check all that apply.)

- ◯ About.com
- ◯ Atlanta Journal Constitution (AJC)
- ◯ Facebook/Twitter/ LinkedIn
- ◯ Fidelity
- ◯ Google Ad/Search
- ◯ Local Event____________________
- ◯ "Money Matters" Radio Show
- ◯ Referral by____________________
- ◯ Schwab
- ◯ "You Can Retire Sooner Than You Think" by Wes Moss

Client Information

Client A.

Name: Last____________ First____________ Middle____________

Home Address: Number________ Street____________ Apt/Unit____________

City____________ State____________ Zip Code____________

Work Phone:____________ Cell Phone____________ Email____________

Occupation:____________ Employer____________ Date of Birth____________

Desired Retirement Age:____ Emergency Contact: Name____________ Phone____________

Client B.

Name: Last____________ First____________ Middle____________

Home Address: Number________ Street____________ Apt/Unit____________

City____________ State____________ Zip Code____________

Work Phone:____________ Cell Phone____________ Email____________

Occupation:____________ Employer____________ Date of Birth____________

Desired Retirement Age:____ Emergency Contact: Name____________ Phone____________

Income

Clients	A	B	Totals
Salary			
Pension			
Social Security			
Other			
Total Income			

Children	Age

Retirement Income

Estimated Monthly Needs: ____________

Monthly Retirement Income: ____________

Shortfall/Surplus: ____________

Goals & Objectives

____

____

____

Real Estate

Primary Residence:

Other:

Debt

Credit Card:

Auto:

Remaining Mortgage Balance:

Other:

Estate Plans

Wills:

Trusts:

Power of Attorney:

Professional Contacts

CPA/Accountant:

Attorney:

Insurance:

Other:

Insurance (Life, Disability, LTC)

Policy Holder	Type	Amount	Notes

Investments (401K, Roth, IRA, Brokerage, Trust)

Account Holder	Type	Amount	Notes

Date: ____________ Advisor: ____________ CALI: ____________