



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:

Mortgage Balance:

Other:

Estate Plans

Wills:

Trusts:

Power of Attorney:

Insurance (Life, Disability, LTC)

Policy Holder	Type	Amount	Notes

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

Account Holder	Type	Amount	Notes

Date: _____

Advisor: _____

CALI: _____