



# 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: \_\_\_\_\_