



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:

Home Equity:

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: _____