



Financial Futures

achieving your goals through financial planning

Introductory Confidential Questionnaire

Client Name: _____ Co-Client Name: _____

Date of Birth: ____ / ____ / ____ Date of Birth: ____ / ____ / ____

Any Previous Marriages: Y / N Any Previous Marriages: Y / N

Ever Declared Bankruptcy: Y / N Ever Declared Bankruptcy: Y / N

Involved in any Lawsuits: Y / N Involved in any Lawsuits: Y / N

Marital Status: _____ Date of Marriage: ____ / ____ / ____

Employer: _____ Employer: _____

Position: _____ Position: _____

Gross Income: \$ _____ Gross Income: \$ _____

Assets:

Total Cash: \$ _____

Total Investments: \$ _____

Total Retirement Assets: \$ _____

Home Value: \$ _____

Other Real Estate: \$ _____

Business Value: \$ _____

Other Personal Assets: \$ _____

Debts:

Total Mortgage: \$ _____

Total Home Equity Debt: \$ _____

Total Credit Card Debt: \$ _____

All Other Debt: \$ _____

Home Address: _____

Children's Names & Ages:

Home Phone: ____ - ____ - ____

Home Fax: ____ - ____ - ____

Home E-mail: _____
