

# Fact Finder: Client Questionnaire



## Participating Parties

Client Names: \_\_\_\_\_

Appointment Date: \_\_\_\_\_

Note: \_\_\_\_\_

Household Members	Person 1	Person 2	Person 3	Person 4
First Name				
Last Name				
Date of Birth (00/00/0000)				
Gender (M/F)				
Effect Tax Rate				
Home Phone Number				
Business Phone Number				
Email Address				

Principal Information	Principal 1	Principal 2
Age Today		
Age at Retirement		
Life Expectation		
Years to Retirement		
Tax Filing Status (Married-joint, Married-Separate, Single, Head of Household)		

## Financial Accounts

Account Type	Name	Owner	Value

## Future Savings/Retirement Contributions

Name	Account Name	Frequency	Start Date	End Date	Amount

### Future Savings/Educational Contributions (529)

Name	Account Name	Frequency	Start Date	End Date	Amount

### Future Savings/Additional Savings/Income/Income Cash Flow

Name	Account Name	Frequency	Start Date	End Date	Amount

### Future Benefits (Social Security, Pensions, Annuities)

Name	Start Date	Amount	COLA	Additional Adjustments

### Retirement Expense Goals

Expected Expenses	Necessary Amount	Target Amount	Aspirational Amount
Food			
Entertainment			
Long Term Care			
Rent			
Supplement Health			
Total			

### Other Goals

Personal Goals	Start Date	End Date	Frequency	Necessary Amount	Target Amount	Aspirational Amount
Auto Expense						
Auto Insurance						
Clothing						
Home Insurance						
Maintenance Repair						
Other						
Personal Care						
Real Estate Taxes						
Vacations						
Total						

Living Goals	Start Date	End Date	Frequency	Necessary Amount	Target Amount	Aspirational Amount
Groceries						
Entertainment						
Utilities						
Telephone						
Total						

Medical Expense Goals	Start Date	End Date	Frequency	Necessary Amount	Target Amount	Aspirational Amount
Prescription Drugs						
Medical Insurance						
Total						

**Fact Finder:**  
Client Questionnaire



Financial Goals	Start Date	End Date	Frequency	Necessary Amount	Target Amount	Aspirational Amount
Educational Goals						
Insurance Premiums						
Mortgage Payments						
Other Payments						
Personal Loans						
Personal Use Property						
Rental Expense						
<b>Total</b>						

One Time Lump Sum	Start Date	End Date	Due Date	Frequency	Necessary Amount	Target Amount	Aspirational Amount
Pay Off							
Purchases							
Real Estate Purchases							
Vehicle Purchase							
Other							
<b>Total</b>							