



Written By _____

Current Annual Income \$ _____

Mailing Address _____

Debt \$ _____

Current Emergency Fund \$ _____

DOB _____

Desired Emergency Fund \$ _____

Phone _____

Next Big Purchase _____

Email _____

Amount \$ _____

1. List 5 things that are most important to you:

5. If you had a \$250,000 investment that lost \$50,000 during a market decline, how likely would you be to sell the remaining \$200,000 and reinvest it in something more stable? One being least likely, 5 being most likely:

Circle one: 1 2 3 4 5

2. What are the purposes of money in your life?

6. Are you interested in certain investments? Are there any industries you would like to support or exclude from your portfolio?

3. List some short-medium-and long-term goals:

7. List some of the causes you support:

4. What are the greatest concerns in your life, financial or otherwise, right now?

8. List your interests/passions/hobbies:

