

Confidential Financial Questionnaire

Background Information

Family Data:

	Name (First MI Last)	Date of Birth	Birth Place	Driver's Lic. # & exp. Date
You	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>
Spouse	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>
Child	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>
Child	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>
Child	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>
Child	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>
Child	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>

Contact Info:

	Mobile	E-Mail	Work Phone	Home Phone
You	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>
Spouse	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>

Residence :

Street Address City State Zip-Code

Employment Data:

	Occupation	Employer	How Long	Fax
You	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>
Spouse	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>

	Base Salary	Mode	Commissions	Stock Options	Estimated Bonus
Your Primary Income	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>
Spouse's Primary Income	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>

Other Income:

Rental Income Royalties Trust Income Second Business

Real Estate

Property

	Year	Purchase Price	Improvements or Capital Expenditures	Current Market Value (Est.)
Your Residence				
Other Home				
Other Home				
Land				
Land				
Other				

Loans & Debt:

**Include personal loans, college loans, home improvement loans, automobile or boat loans
passbook loans, credit card balances, store charges, checking credit lines, etc.)**

Type of Loan	Interest Rate	Monthly Payment/P&I	Months Remaining	Unpaid Balance	Extra Monthly Payment

Miscellaneous Personal Property

(Show estimated market value of what you own today - NOT replacement value)

<i>Item</i>	Current Market Value
General Household Furnishings & Appliances	
Artwork, Antiques, etc.	
Jewelry, yours	
Jewelry, spouse	
Automobile 1	
Automobile 2	
Automobile 3	
Boat, Trailer, etc.	
Collections	
Other	
Other	
Other	

Estate Planning

- I have a Safety Deposit Box.
- I have Valid, Executed Will.
- I have a Trust.
- I have a Durable Power of Attorney.
- I have a Healthcare Representative.
- I have a Living Will Declaration.

Personal Representative	
Guardian 1	
Guardian 2	
Guardian 3	