FINANCIAL FIDUCIARIES
SMART FINANCIAL DECISIONS

INDIVIDUAL PLANNING QUESTIONNAIRE

Personal Information

Name:____ Your D.O.B.: ____________

Address:____

Phone Number:_____________________E-Mail:_____________Marital Status:____________

Spouse Name, if any:______________________Spouse’s D.O.B.______________________

Please list the names and ages of children and grandchildren from this marriage and any previous marriages, clearly identifying each. Attach separate sheet if necessary.

Children: ________________ __________________ _________________

Corresponding
Grandchildren: _________ _________ _________ ________ ________ ________

List Husband's sources and amounts of annual income: ______________________________
____

List Wife's sources and amounts of annual income: ______________________________
____

What is your current lifestyle? What is your combined annual spending? Annual savings?

____

List up to 3 of your most important concerns about your financial situation at this time:

1. ____

2. ____

3. ____

Please describe any health issues, expected changes to your income or expected changes in your cash resources that would have an effect upon your plans for your financial future:

____

____

Asset Information

Real Estate Holdings: Please attach a list showing, for each parcel of real estate you own:

Type of Property, how titled, approx. current value, approx. cost (tax) basis, mortgage amount

Other Investments: Please attach a copy of a recent statement for each investment asset you own. **If a statement is not available**, please provide the following information:

- *IRA, 403(b) and qualified annuity investments*
  Company or Bank where held, type of investment, current value to nearest $5,000

- *Non-qualified annuities*
  Owner, company where held, fixed or variable, if variable % in stocks and bonds, invested amount, current value

- *Other Investments*
  Owner, company where held, name (kind) of investment, cost, current value

- *Retirement Benefits*
  Amount of guaranteed income at retirement ***or*** current value, % stocks and bonds

- *Life Insurance*
  Owner, beneficiary, whose life, face amount, cash value (if applicable), type of contract, annual premiums

Estate Planning Information

For estate planning advice, please provide the following:

Current Wills
Financial Powers of Attorney
Marital Property Agreements
Revocable and/or Irrevocable Trust Agreements
Health Care Powers of Attorney
Buy/Sell Agreements on any Business Interests