

WOMEN FINANCIAL

— FINANCIAL PLANNING

POWER

NEW CLIENT CONFIDENTIAL QUESTIONNAIRE

Please fill in the information and return to info@womenfinancialpower.com to schedule an appointment.

Name : _____

Date :

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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PERSONAL INFORMATION

Full Name :

Place Of Birth : Date Of Birth :
D D M M Y Y

Full Address :

Status : Single Married Divorce Others

Occupation : Postcode :

Annual Income : City / Country :

Bonus Income :

Email Address : Mobile: :

Co-Client

Full Address :

Status : Single Married Divorce Others

Occupation : Postcode :

Annual Income : City / Country :

Bonus Income :

Email Address : Mobile: :

CHILDREN

Full Name

Date of Birth : / /

Gender : Male Female

Marital Status :

Full Name:

Date of Birth : / /

Gender : Male Female

Marital Status :

Full Name:

Date of Birth : / /

Gender : Male Female

Marital Status :

Full Name:

Date of Birth : / /

Gender : Male Female

Marital Status :

GETTING TO KNOW YOU:

How did you hear about us?

What qualities are you looking for in a financial planner?

Do you have any upcoming life events?

List your 3 most critical financial planning priorities:

1.

2.

3

FINANCIAL INFORMATION

(PLEASE USE CAPITAL \$)

Cash Equivalents:

Checking and Savings Accounts: _____
Money Market Accounts: _____
Certificates of Deposit: _____
Life Insurance Cash Value _____

Stocks & Bonds

1. _____
2. _____
3. _____
4. _____

Retirement Accounts:

IRA Accounts _____
Roth IRA Accounts _____
401(k) Accounts _____
Deferred Compensation Plans _____
Other: _____

Transportation

Auto Loans _____
Auto Insurance _____
Fuel _____
Repairs _____
Other: _____

Real Estate

Primary Residence: _____ Secondary Residence: _____

Other Real Estate: _____

ADDITIONAL ASSETS

1. _____ 4. _____
2. _____ 5. _____
3. _____ 6. _____

Liabilities

Primary Home Mortgage : _____ Other Loans : _____
Secondary Mortgage : _____ Other Loans : _____
Home Equity Line of Credit : _____ : _____

Credit Cards

1. : _____ 4. : _____
2. : _____ 5. : _____
3. : _____ 6. : _____

Additional Debt

1. : _____ 4. : _____
2. : _____ 5. : _____
3. : _____ 6. : _____

Entertainment

Home - Shows - Events _____
Sports - Hobbies - Lessons _____
Vacation - Travel _____
Dues - Memberships _____
Other: _____

Daily Living

Groceries _____
Dining - Eating Out _____
Shopping _____
Salon - Massage - Manicure _____
Other: _____

More Information :
Memphis TN
+901617(Office) / info@womenfinancialpower.com
www.womenfinancialpower.com

THANK YOU FOR YOUR INFORMATION



All information is kept confidential in accordance with our privacy policy