



Written By \_\_\_\_\_

Current Annual Income \$ \_\_\_\_\_

Mailing Address \_\_\_\_\_

Debt \$ \_\_\_\_\_

DOB \_\_\_\_\_

Current Emergency Fund \$ \_\_\_\_\_

Phone \_\_\_\_\_

Desired Emergency Fund \$ \_\_\_\_\_

Email \_\_\_\_\_

Next Big Purchase \_\_\_\_\_

Amount \$ \_\_\_\_\_

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

5. If a \$10,000 investment you made for ten years lost value in the first year, at what dollar value would you sell and transfer the funds to a more stable investment rather than wait for a turnaround? When the value reaches:

\$ \_\_\_\_\_

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: