**Client 1 Name Client 2 Name Meeting Date**

Our firm offers comprehensive financial planning, with our goal being to help our clients achieve their financial goals, make better financial decisions, and feel more secure about their wealth.

To that end, I am going to ask you some questions today to assess how we can best help you. We believe strongly that with enough time and attention, any goal can be accomplished. So with that in mind…

**Client 1 DOB Client 2 DOB**

Raised

Education, background

Date of marriage

Kids, names, DOBs, interests, careers

1.

2.

3.

Supporting kids now/future?

What in life brings you the most joy?

What is in your life today that you wish you could remove?

Financial goals

Financial concerns

Role of money in your life / child hood

Supporting any parents / siblings

What do you spend money on that brings you happiness?

If you had more money, what would you do differently?

“If we were meeting three years from today – and you were to look back over those three years to today – what has to have happened during that period, both personally and professionally, for you to feel happy about your progress?

**Hard Data**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | **Location** | **Value** | **Debt & Terms** | **Paid** | **Game Plan** |
| **Primary Residence** |  |  |  |  |  |
| **Vacation Home 1** |  |  |  |  |  |
| **Vacation Home 2** |  |  |  |  |  |
| **Rental 1** |  |  |  |  |  |
| **Rental 2** |  |  |  |  |  |
| **Rental 3** |  |  |  |  |  |
| **Rental 4** |  |  |  |  |  |

Monthly Inflow – amount & sources

Monthly Expenses – guestimate, we will use tax returns or budget worksheet to fine tune

Investments & Retirement Plans

|  |  |  |  |
| --- | --- | --- | --- |
| **Account** | **Custodian** | **Value** | **Portfolio/Comments** |
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Insurance

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| --- | --- | --- | --- |
| **Policy Type** | **Carrier** | **Benefits** | **Premiums** |
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Estate Planning

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| --- | --- | --- |
| **Documents** | **Last Updated** | **General Goals** |
| RLT |  |  |
| Wills |  |  |
| Irrev Trust |  |  |
| HCD |  |  |
| FPOA |  |  |