

# 30-Minute Client Consultation

Name & Last Name: \_\_\_\_\_ Email Address: \_\_\_\_\_ Appointment Date & Time: \_\_\_\_\_ Phone No. \_\_\_\_\_  
 Mailing Address \_\_\_\_\_

**FINANCIAL GOALS:**

1. \_\_\_\_\_  
 2. \_\_\_\_\_

**SAVINGS NOW** \_\_\_\_\_  
**WEEKLY HRS** \_\_\_\_\_



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<b>Current Position:</b>	<b>Monthly Salary:</b>	<b>Age:</b>	<b>Months to 65:</b>	<b>Income At 65:</b>
<b>Current Position:</b>	<b>Monthly Salary:</b>	<b>Age:</b>	<b>Months to 65:</b>	<b>Income At 65:</b>



**MONEY = WORK**

**WORK = ENERGY + TIME**



- Relationships
- Family
- Health
- Training
- Business
- Investments
- Skills
- Education
- Hobbies
- Professional Growth
- Spiritual Growth
- Personal Growth

**WEALTH**

$\$27.50 \text{ per day} \times 365 \text{ days} \times 10 \text{ years} = \$100,350$

Marital Status \_\_\_\_\_ Kids Ages \_\_\_\_\_  
 Student Loans \_\_\_\_\_ Car Payments \_\_\_\_\_  
 Home Owner \_\_\_ Bed/Bath \_\_\_\_\_ SQft \_\_\_\_\_ Purchase Year \_\_\_\_\_  
 Purchase Price \_\_\_\_\_ Mortgage Amount \_\_\_\_\_ Price Now \_\_\_\_\_

**LIFESTYLE = MONEY + DAILY ACTIVITIES & LIFE EVENTS**

**What did I spend money on?**  
 (Daily activity & amount that makes you use money)



Example: \$9.50 lunch at work or \$14.99 Car wash)

Asset/Liability	Growth		Income		Protection		Debt		Tax Advantage	
	Yes	No	Yes	No	Yes	No	Yes	No	TODAY	Tomorrow
Home										
Business										
Pension										
401K										
403b										
IRA										
Roth IRA										
Car										
Life Ins										
Car Ins										
Annuities										
Investments										
Other/Credit										

	YES	NO
Did I spend on what I value the most?	___	___
Does it improve quality of life?	___	___
Rank the importance	___ High	___ Low

**DID I GAIN WEALTH?**

\_\_\_

Do I wealth it? or Do I waste it?