

CLIENT INFORMATION WORKSHEET

General Questionnaire

1. What is your occupation?

2. What is your annual income?

3. What are your estimated monthly expenses? (Mortgage, Auto, Insurance, Travel, Entertainment etc.)

4. Do you ever want to stop working, if yes when?

If no, do you want enough income to maintain your lifestyle so that you can work when you want?

5. Are you or do you want to be debt free?

6. Would you like your financial picture to be at your fingertips?

7. Do you think this economy will stop growing after you retire?
