



# CLIENT QUESTIONNAIRE



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Client Name

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Advisor Name

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Date



## NET WORTH

	Joint	Client	Spouse
Real Estate/Property	\$ _____	\$ _____	\$ _____
Retirement Investments	\$ _____	\$ _____	\$ _____
Personal Investments	\$ _____	\$ _____	\$ _____
Other Investments	\$ _____	\$ _____	\$ _____
Business Interests	\$ _____	\$ _____	\$ _____
Total Mortgage Debt	\$ _____	\$ _____	\$ _____
Total Credit Card Debt	\$ _____	\$ _____	\$ _____
All Other Debt	\$ _____	\$ _____	\$ _____

## INCOME & SAVINGS

\_\_\_\_\_  
Salary

\_\_\_\_\_  
Spouse Salary

\_\_\_\_\_  
Other Income

\_\_\_\_\_  
Spouse Other Income

\_\_\_\_\_  
Savings (Qualified)

\_\_\_\_\_  
Savings (Qualified)

\_\_\_\_\_  
Savings (Non-Qualified)

\_\_\_\_\_  
Savings (Non-Qualified)

\_\_\_\_\_  
Social Security Benefits

\_\_\_\_\_  
Social Security Benefits

## PROTECTION

\_\_\_\_\_  
Client Death Benefit \$

\_\_\_\_\_  
Spouse Death Benefit \$

\_\_\_\_\_  
What other types of insurance policies do you have?

## ADDITIONAL REMARKS

Is there any information you would like us to know which was not covered in this questionnaire?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

# VAULT CHECKLIST

## LEGAL DOCUMENTS

- Wills
- Deeds
- Revocable & Irrevocable Trusts
- Power of Attorney
- Codicils (Supplements made to a Will)
- Living Wills/Health Directives
- Prenuptial Agreements
- Buy/Sell Agreements
- Contracts

## BENEFITS

- Social Security Info
- Veteran's Administration Info
- Employment Benefits

## INSURANCE POLICIES

- (Life, LTD, Disability, Medical, Car, Property)

## BANK & INVESTMENT STATEMENTS

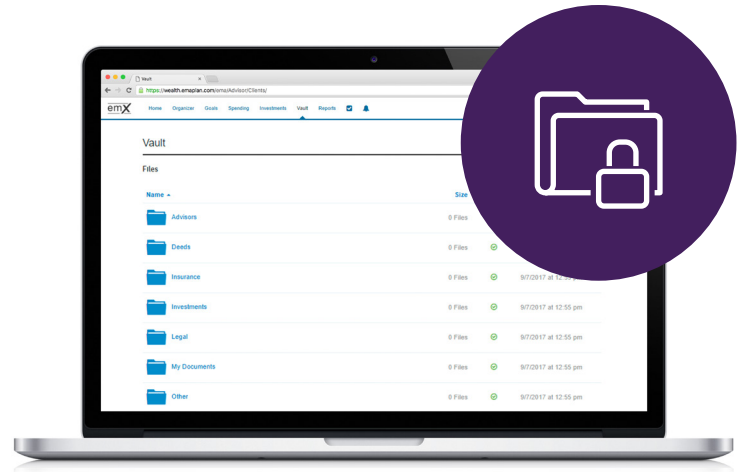
- Pensions, IRAs, Annuities, etc.
- Investment Accounts
- Stock Options/Certificates

## LIABILITIES

- List of Credit Cards with Contact Information
- Mortgages
- Loans

## TAXES

- Tax Returns
- W-2 Forms



## IDENTIFICATION

- Birth Certificates
- Drivers Licenses
- Passports
- Social Security Cards

## FAMILY

- Adoption Papers
- Medical Records
- Marriage License
- Pictures
- Audio Files
- Video Clips

## PROPERTY

- Titles to Homes, Autos, Boats, etc.
- Warranties

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## PROFESSIONAL CONTACTS

Name \_\_\_\_\_ Relationship \_\_\_\_\_

Phone \_\_\_\_\_ Email \_\_\_\_\_

Name \_\_\_\_\_ Relationship \_\_\_\_\_

Phone \_\_\_\_\_ Email \_\_\_\_\_