# Financial Planning Questionnaire

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| Name: |  |
| Phone Number: |  |
| Email Address: |  |
| Address: |  |
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1. Are you married or in a domestic partnership? If so, what is the name of your spouse or partner? Are you looking for a joint financial plan?

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1. Do you have children? If so, how many, and what are their ages? Do you plan on having more children?

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1. What is your current employment status? How long have you worked there? Do you foresee continuing to work there long? What is your annual salary?

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1. Do you have any medical concerns that could impact your financial situation?

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1. What goal do you wish to achieve from financial planning? Do you want to save up for a large expense, get out of debt, prepare for retirement, or do you have another goal?

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1. What are your assets? Please list all investments, cash and bank accounts, stocks, bonds, property, vehicles, furniture, or other assets along with how much they are worth.

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1. What are your liabilities? Please list all debt, including credit cards, personal loans, car loans and mortgages, along with the amount and the terms.

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1. What is the total cost for your annual personal expenses? What is your proposed budget? Please enclose a list of your total expenses for this past year, grouped into categories (i.e. groceries, dining out, entertainment, sports and leisure, rent, medical).

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1. Do you foresee any large expenses in the near future?

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1. Do you plan on having to pay any education costs in the future? (i.e. college or private school tuition for children or for yourself).

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1. Do you have any other forms of income, or do you expect any? (i.e. pension, social security, alimony, disability insurance, secondary employment, etc.)

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1. Please include your tax information from the past two years.

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