# Financial Planning Questionnaire

|  |  |
| --- | --- |
| Name: |  |
| Phone Number: |  |
| Email Address: |  |
| Address: |  |
|  |  |

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?

|  |
| --- |
|  |
|  |
|  |

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

|  |
| --- |
|  |
|  |
|  |

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?

|  |
| --- |
|  |
|  |
|  |

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

|  |
| --- |
|  |
|  |
|  |

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?

|  |
| --- |
|  |
|  |
|  |

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.

|  |
| --- |
|  |
|  |
|  |

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.

|  |
| --- |
|  |
|  |
|  |

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).

|  |
| --- |
|  |
|  |
|  |

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

|  |
| --- |
|  |
|  |
|  |

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).

|  |
| --- |
|  |
|  |
|  |

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.)

|  |
| --- |
|  |
|  |
|  |

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

|  |
| --- |
|  |
|  |
|  |

**Copyright information - Please read**

© This [**Free Microsoft Office Template**](http://www.hloom.com/more/) is the copyright of Hloom.com. You can download and modify this template for your own personal use. You can (and should!) remove this copyright notice ([click here to see how](http://www.hloom.com/resumes/how-to-format-word/)) before customizing the template.

You may not distribute or resell this template, or its derivatives, and you may not make it available on other websites without our prior permission. All sharing of this template must be done using a link to <http://www.hloom.com/>. For any questions relating to the use of this template please email us - [info@hloom.com](mailto:info@hloom.com)