

## Financial Planning Questionnaire

Please complete and submit the financial planning questionnaire.  
You may also download and fax the completed form to 404-393-3063.

Last Name:   
First Name:

Last Name:   
First Name:

### Federal Tax Bracket:

- 10%     15%     25%     28%     33%     35%     39.6%

### Investments

Investment Purpose:

- Save for education     Income     Preserve wealth  
 Retirement purposes     Accumulate wealth     Market specification  
 Save for short term goals     Other:

What is your risk tolerance?

- Conservative     Moderately Conservative     Moderate  
 Moderately Aggressive     Aggressive     Speculative

What is your time horizon?

- Short (Less than 5 years)     Intermediate (5-10 years)     Long (Over 10 years)

Indicate your investment knowledge:

- Excellent     Good     Limited     None

Investment Experience (indicate # of years):

Mutual Funds

Stocks

Bonds

Limited Partnerships

Variable Annuities

Options

**Liquidity Needs:**

Recurring Expenses (annually): \$

Special Expenses (future, non-recurring): \$

Special Expenses Timeframe (indicate # of years):

**Expenses/Cash Flow**

When did you buy your cars?

Car 1

Car 2

Car 3

Car 4

How many years do you typically hold a car before purchasing a new one?

What price range do you spend to buy a new car?

**Financial Independence (A/K/A Retirement)**

At what age do you wish to achieve financial independence?

Do you plan on maintaining a second home?

Yes

No

Do you anticipate changes in your spending?

- Yes                       No

**Insurance**

Is anyone of an older generation going to be, or already are, dependent on you financially?

- Yes                       No

Other than supporting your family do you have any other financial obligations?

- Yes                       No

Do you have anyone in your life with special needs (disabilities)?

- Yes                       No

If yes, please provide name and relationship:

**Education (if applicable)**

Indicate the type of college you plan for your children to attend:

- Public In-State                       Public Out-of-State                       Private College

How many years do you expect your children to attend college?

- Four Years                       Five Years                       Not Sure

Do you plan to pay for graduate school?

- Yes                       No

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Do you have any other expenses that are material that we should budget for your child(ren) (marriage, car, etc...)?

### **Estate Planning**

If you have estate planning documents, are they current, or are there any changes at this time that you wish to make (for example, changing people who are named inside the document or adding a child)?

What year were your estate planning documents drafted?

Do you have a financial power of attorney?

Yes                       No

An advance directive?                       Yes                       No

What state?

### **General**

What is your goal for hiring a financial planner? What do you hope to achieve?

Are there any other goals or financial aspirations that you wish for us to address during the financial planning process?

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