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Client Questionnaire

This questionnaire is designed to help you develop a stronger overall financial plan, and to pinpoint any gaps that should be addressed.

1) Retirement

Do you feel confident with your current retirement plan?
Do you know how much money you will need when you retire?
Have you adjusted your current savings plan in the past 3 years?

2) Estate Planning

Do you have an Estate Plan that covers the following points:

a) Who will have responsibility for distributing your estate?
b) Who gets what and when?
c) Who will care for your children?
d) Who will manage any trust accounts you might have?
e) Who will make final medical decisions in the event of your incapacitation?

Action Items
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3) Debt

Do you feel your credit card debt is too high?
Do you feel overwhelmed with the amount of debt you have?
Do you wish you could lower your debt?

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Action Items
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4) Funding

Do you have an emergency fund established that could provide you with at least 3 months of your current salary?
Have you established a proper education fund for your children?

Action Items
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5) Household Financials

Have you prepared a personal balance sheet? (your assets and liabilities)
Have you prepared a personal cash flow analysis? (what you make vs. what you spend)

Action Items
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6) Savings

Do you have a savings account set up for items you are hoping to purchase? (e.g. vacation, car, renovations)

Action Items
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7) Future Opportunities & Impact

Have you established who, if anyone, could impact your financial plan in the future?
For example, a parent who may need additional care or a child who could need funding for secondary education?

Action Items
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