

NEW

Search results



| | Name | Owner | Last m |
|---------------------|----------|-------|----------|
| My Drive | | | |
| Shared with me | Cop... | me | Aug 18 |
| Recent | Cop... | me | Sep 25 |
| Google Photos | | | |
| Starred | clien... | me | 5:32 PM |
| Trash | | | |
| 18 GB of 30 GB used | | | |
| Upgrade storage | | | |
| | Y H ... | me | Nov 15 |
| | Upd... | me | Aug 8, |
| | YHC... | me | Aug 5, |
| | YHC... | me | Mar 9, |
| | Cop... | me | Mar 2, |
| | Y H ... | me | Mar 9, |
| | YHC... | me | Mar 9, |
| | Y H ... | me | Mar 9, |
| | ppsa... | me | Feb 22 |
| | Inve... | me | Oct 5, 2 |
| | Y H&... | me | Aug 18 |
| | ppsa... | me | Feb 22 |
| | Y H ... | me | Sep 5, 1 |
| | Jord... | me | Nov 20 |
| | Y H ... | me | Sep 5, 1 |
| | Y H ... | me | Sep 5, 1 |
| | Y H ... | me | Feb 27 |
| | YHC... | me | Aug 4, |
| | | me | Sep 2, |

Fm. 1.03

FORM 1.03

Initial Client Information

The four-part form that appears at the beginning of the handbook gather preliminary information about the client. It is used to identify the client and to identify planning opportunities.

Part I. Background Information

Client Name:

Your name:

Home address:

Home telephone:

Marital status:

Spouse's name, if applicable:

Occupation/title: ...

Employer: ...

Office telephone: ...

Ages: ...

Ages of children: ...

Part II. Financial Planning Objectives

Name:

Instructions: Please indicate which objectives are important to you as well as the degree of importance.

Objectives

Improving my personal retirement savings

Saving more regularly

Reducing debt

Reducing income taxes

Ensuring complete insurance coverage

Evaluating investments

Buying a home

Making a major purchase

Meeting college education expenses

1-24

PERSONAL FINANCIAL PLANNING HANDBOOK

Objectives

Assuring a comfortable retirement

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