

GETTING TO KNOW YOU

BACKGROUND

CLIENT NAME _____ SPOUSE _____

DATE OF BIRTH _____ SPOUSE _____

ARE YOU RETIRED? _____ SPOUSE _____

OCCUPATION _____ SPOUSE _____

CHILDREN

NAME _____ AGE _____

NAME _____ AGE _____

NAME _____ AGE _____

NAME _____ AGE _____

NAME _____ AGE _____

GRANDCHILDREN (NUMBER AND AGES) _____

YOUR FUTURE

**LIST THE TOP 3
MONEY GOALS
FOR YOUR FUTURE**

#1 _____

#2 _____

#3 _____

**IF TIME AND
MONEY WERE
NO OBJECT,
I WOULD:**

- | | | | | |
|------------------|-------------------------|-----------------------------|------------------|-------------|
| START A BUSINESS | LEARN A SECOND LANGUAGE | RELOCATE | CLIMB A MOUNTAIN | OTHER _____ |
| WORK PART TIME | TRAVEL | SPEND MORE TIME WITH FAMILY | GOLF | GARDENING |
| VOLUNTEER | READ | HOME IMPROVEMENT | EXERCISE | FISH/HUNT |

OTHER _____

**NAME THREE
THINGS YOU
VALUE THAT
DOES NOT
REQUIRE MONEY**

#1 _____

#2 _____

#3 _____