



SENSIBLE & HOURLY

Confidential Questionnaire

Client Information

Name _____
Address _____
City/State/Zip _____
Home Phone _____
Cell Phone _____
Email _____
Date of Birth _____

Preferred Method of Contact:

Email? Phone?

Client Information

Email? Phone?

Children:

Name _____
Name _____
Name _____
Name _____

Age _____
Age _____
Age _____
Age _____

Employment:

Title/Job/Employer – Client 1 _____
Client 2 _____

How long in this job? _____
When do you plan to retire? _____
Do you have a pension? _____

Estate Planning:

Do you have a will? _____
Trust? Type? _____
Power of Attorney _____
Any other relevant documents? _____

Tax Planning:

Who do you use to prepare your taxes? _____ Self? _____

Investments:

How are your investments currently allocated?

IRAs/401ks/403bs?

1. _____
2. _____
3. _____

Roth's?

1. _____
2. _____

Taxable Accounts?

1. _____
2. _____

Annuities?

1. _____
2. _____

Insurances? Long Term Care? Whole Life? Term?

1. _____
2. _____

Cash Accounts/Savings/CD's?

1. _____
2. _____
3. _____

Advisor/Professional Relationships?

Accountant _____

Attorney _____

Financial Planner _____

Insurance Agent _____

Personal Assets:

Primary Residence – Value _____

Second Home – Value _____

Furnishings – Estimated _____

Vehicle _____

Vehicle _____

Collectibles _____

Other _____

Personal Financial Preferences

Indicate your attitudes or beliefs in regards to the following statements on a scale of 1-5.

	Client 1	Client 2
I consider myself a risk taker.	_____	_____
I am pretty sure things generally will work out.	_____	_____
Assets that stay the same are better than reductions	_____	_____
Assets that stay the same are not productive	_____	_____
I prefer assets I can count on	_____	_____
I am looking for income rather than growth	_____	_____
I prefer simple solutions over complex solutions	_____	_____
I consider myself frugal	_____	_____
It is important to me to leave assets to my heirs	_____	_____
Growth oriented investments are to be preferred	_____	_____
Volatility is to be expected for successful investments	_____	_____

Additional Items:

In order to complete your financial plan, the firm may also need additional items such as:

- Statements of investment accounts
- Prior year tax returns
- Employee benefit information
- Insurance policies
- Estate planning documents
- Retirement plan statements

If you are interested in sending this questionnaire ahead of your appointment, please send to:

Sensible Financial Solutions, LLC
P.O. Box 758
Kalkaska, MI 49646.

If you are comfortable sending via email, please send to: dawn@sensibleandhourly.com

If you have any other questions, please reach out via email or call at 231-384-5270.

