

INITIAL MEETING QUESTIONNAIRE

WJM Financial, LLC

Personal Information

<u>CLIENT</u>		<u>CO-CLIENT</u>	
Name:	_____	Name:	_____
Date of Birth:	_____	Date of Birth:	_____
Employer	_____	Employer	_____
Occupation	_____	Occupation	_____
Street: _____		Home phone: _____	
City: _____	State: _____	Home fax: # _____	
Zip Code: _____		Email Address: _____	

How were you referred to us?

Primary Planning Objectives

Priorities – Please identify your three most important financial planning objectives.

<i>Client</i>	<i>Co-client</i>
1. _____	1. _____
2. _____	2. _____
3. _____	3. _____

Income Sources

<i>Description</i>	<i>Client</i>	<i>Co-Client</i>
Employment salary	\$ _____	\$ _____
Employment bonus	\$ _____	\$ _____
Self-employment income	\$ _____	\$ _____
Alimony received	\$ _____	\$ _____
Other income	\$ _____	\$ _____

Assets

Real Estate

	Approximate Market Value	Outstanding debt on this property	Rental income (if applicable)
Primary residence	\$ _____	\$ _____	\$ _____
Secondary residence	\$ _____	\$ _____	\$ _____
Other:	\$ _____	\$ _____	\$ _____

Savings, Investment, and Retirement Accounts

Account	Account Owner			Approximate value	Annual savings
	Client	Joint	Co-client		
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$ _____	\$ _____
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$ _____	\$ _____
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$ _____	\$ _____
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$ _____	\$ _____
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$ _____	\$ _____
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$ _____	\$ _____
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$ _____	\$ _____

Liabilities

Please list the debts that are not included with the real estate assets above

	Current balance	Interest rate
Line of credit	\$ _____	_____ %
Credit card	\$ _____	_____ %
Credit card	\$ _____	_____ %
Other loan	\$ _____	_____ %
Other loan	\$ _____	_____ %

Miscellaneous
