

<b>Name</b>		
<b>Address</b>		
<b>Phone</b>		
<b>Email</b>		
<b>Visited website?</b>	<a href="http://www.adviceonly.net">www.adviceonly.net</a> <u>Read "Details" section?</u>	Yes/No
<b>Permission</b>	Should we use mail/email/phone to contact you? (circle)	Yes/No
<b>Do you understand?</b>	Advice rendered is dependent on information you provide?	Yes/No
<b>Do you understand?</b>	Advice can become outdated as situation changes?	Yes/No
<b>Type</b>	Aggressive/Moderate/Conservative investor	Circle
<b>Saving for</b>	Retirement/College/Travel/Other	Circle
<b>Concerns</b>	Risk/Running Out of Money/Making Mistakes/Debt/Other	Circle
<b>Further Concerns</b>		List
<b>Further Concerns</b>		List
<b>Bring</b>	1. Account Statements: Savings/Investments/Retirement	
	2. Pay Stub	
	3. Home/Auto Ins. Statements	
	4. Life/Disability Ins. Policies	
	5. Tax Return	
	6. Social Security Annual Statement	

## The Bottom Line

<b>Income</b>	
Client 1	
Client 2	
Other	
<b>Total</b>	0
<b>Outgo</b>	
Mortgage, Prop. Taxes, Insurance, HOA	
Income taxes	
Vehicle payments, gas	
Loan and Credit Card balance payments	
Utilities	
Miscellaneous (clothes, gifts, charity, etc)	
Groceries/Dining Out	
Insurance (car, life, health)	
Retirement contributions	
Savings	
Medical and Dental	
<b>Total</b>	0
<b>Assets (You Own)</b>	
House	
Business	
Rental Properties	
Retirement Savings	
Other Savings	
Vehicles	
Other	
<b>Total</b>	0
<b>Liabilities (You Owe Others)</b>	
Mortgage(s)	
Home Equity Loan(s)	
Vehicle Loans	
Credit Card and other loans	
Other	
<b>Total</b>	0
<b>Net Worth</b>	0

Date: \_\_\_\_\_