FINANCIAL PLANNING ORGANIZER

CLIENT

DATE

Wold, Consulting, PC

10201 South 51st Street
Phoenix, AZ 85044
480-763-9653

CLIENT INFORMATION

CLIENT NAME:	
ADDRESS	
CITY,STATE,ZIP	
HOME PHONE	
HUSBAND'S FULL NAME	
HUSBAND'S SS NUMBER	
HUSBAND BIRTHDATE	
EMPLOYER (H)	
WORK PHONE (H)	
CELL PHONE (H)	
EMAIL (H)	
WIFE'S FULL NAME	
WIFE'S SS NUMBER	
WIFES BIRTHDATE	
EMPLOYER (W)	
WORK PHONE (W)	
CELL PHONE (W)	
EMAIL (W)	

CHILDREN:	BIRTHDATE	SS #

Questionnaire

I would like guidance in the following:

#	Item	YES	NO	N/A
1	Income Tax Planning & Reduction			
2	Growth in Assets			
3	Debt Reduction & Management			
4	Investment Management			
5	Investment Performance Evaluation			
6	Budget & Spending			
7	Estate Tax Planning			
8	Estate Planning (Wills, Trust and Propate Avoidance)			
9	Employment Agreements			
10	Stock Option Agreements			
11	Pension and Profit Sharing Plans, 401-K plans			
12	Deferred Compensation Agreements			
13	Business Buy-Sell Agreements			
14	Medical Insurance			
15	Life Insurance			
16	Spouse's Life Insurance			
17	Dependent's Life Insurance			
18	Disability Insurance			
19	Spouse's Disability Insurance			
20	Home Owners Insurance			
21	Personal Liability Insurance			
22	Professional Liability Insurance			
23	Automobile Insurance Coverage			

I hope to achieve the following through financial planning:

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So I don't forget, here are some questions that I have regarding my personal finances:

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RISK

How long of a period of time are you willing to see "poor" performance with your investments, before you would demand a change? ____________ years

What do you consider "a lot of money" $ ____________

Would you feel worst about losing "a lot" by seeing your investments go down (A) or by having missed a opportunity to have made "a lot" (B)? ____________

RETIREMENT GOALS

Retirement income desired in today's dollars. $ ____________

In how many years would you like to be financially secure so that you could retire? ____________

What do you feel the rate of inflation will average during that time? ____________

What rate of return would you expect on your investments without incurring an unacceptable risk? ____________ %

FINANCIAL GOALS

(i.e. College educations, house down payment, car, boat, travel, etc.)

Priority Rating 1 - 10 1 = Most Important	Item	Years to Achieve	Cost in Today's Dollars

Checklist

- Last Tax return
- Current paystub
- Employer Benefit Information
  - Pension Plan
  - Profit Sharing Plan
  - Life Insurance
  - Disabilty Insurance
  - Stock Option Plans
- IRA information
- Information on any investments
- List of debts,pmts, interests, balances
- Property taxes & Insurance
- Current Insurance information;
  - Life
  - Health
  - Disability

SCHEDULE OF INCOME & TAXES

ANNUAL INCOME *	CLIENT	SPOUSE	TAXES	CLIENT	SPOUSE
Salary			FICA		
Bonuses/Commissions					
Dividends/Interest			Federal Income Taxes		
Net Real Estate					
Other (List) *			State Income Taxes		
Total			Available Income		

CASH NEEDS SUMMARY
(Not Including Income Taxes)

ITEM (Don't Include Loan Payments)	MONTHLY AVERAGE	OR ANNUAL
Auto	$	$
Clothes	$	$
Contributions	$	$
Entertainment	$	$
Food & Supplies	$	$
Home Expenses	$	$
Insurance	$	$
Medical	$	$
Vacations	$	$
	$	$
	$	$
	$	
	$	$
	$	$
	$	$
	$	$
	$	$
	$	$
	$	$
TOTAL	$	$
DEBT SERVICE (From Schedule of Liabilities)	$	$
TOTAL CASH NEEDS	$	$

SCHEDULE OF ASSETS AS OF ______________________

DESCRIPTION	COST	MARKET VALUE
	$	$
	$	$
	$	$
	$	$
	$	$
	$	$
	$	$
	$	$
	$	$
	$	$
	$	$
	$	$
	$	$
	$	$
	$	$
	$	$
	$	$
	$	$
	$	$
	$	$
	$	$
	$	$
	$	$
	$	$
	$	$
	$	$
	$	$
	$	$
	$	$
	$	$
	$	$

Please include all assets including stocks, bonds, CDs, checking accounts, savings accounts, homes, jewelry, automobiles, recreational vehicles, home furnishings, etc.

SCHEDULE OF LIABILITIES AS OF ____________________

DESCRIPTION	MIN PAYMENT	INT. RATE	FIXED-F ADJ-A	CURRENT BALANCE
	$	%		$
	$	%		$
	$	%		$
	$	%		$
	$	%		$
	$	%		$
	$	%		$
	$	%		$
	$	%		$
	$	%		$
	$	%		$
	$	%		$
	$	%		$
	$	%		$
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	$	%		$
	$	%		$
	$	%		$
	$	%		$
	$	%		$
	$	%		$
	$	%		$
	$	%		$

Please include all liabilities including home mortgages, automobile loans, credit cards, etc.