

DATAORGANIZER	Date//
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Please complete this questionnaire in advance and bring it to us to your first appointment.

We will hold this information in strict confidence

Personal Information			
Name:		Name:	
Date of Birth:		Date of Birth:	
Dave of Davis		Date of Birm.	
г 1		г 1	
Employer:		Employer:	
Occupation:		Occupation:	
Contact Informa	tion		
Contact in ionna			
Street:			
Silect.			

City:		State, Zip Code:	
•••••••			
Phone Number:		Phone Number:	
mone rumber.		Thone Number.	
Fax Number:		Fax Number:	
E-mail Address:		E-mail Address:	

Page 2 of 5 **KJH Financial Services**

Goals	&	Ob	jectiv	es
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1.	What are your top financial concerns?
2.	What three significant "things" do you want to accomplish during the next ten years?
3.	What is standing in your way?
4.	What life-goals do you want to accomplish once you achieve financial independence?
O	her Issues
	How is your health? Are there any issues we need to be aware of?
2.	How are your parents' financial health & status? Do you expect any inheritance(s)? If so, approximately when and how much?
	K.IH Financial Services Needham MA — Tel: 781.413.4879 — Fmail: kim@kihfinancialservices.com — Web: www.kihfinancialservices.com

Page 3 of 5 **KJH Financial Services**

Retirement		
:		
Name:		
How old are you?		
At what age do you expect to retire?		
What is your Social Security per month at 62 and at your full retirement age?		
How much do you contribute to each retirement account (401(k), IRAs, SEP, Keogh)? Include any employer match. (i.e. IRA - \$3,000)		

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Asset Protection

What insurance do you carry? Please provide company name, covered amount, deductible, and premium cost.

	Company Name	Covered Amount	Deductible	Pre miu m Cost
Homeowner:				
Auto:				
Umbre lla:				
Disability:				
Long-Term Care:				
Life:				
Other:				

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Estate Planning

1.	Do you have an up-to-date estate plan (wills, trusts, financial & medical powers of attorney, and living wills)? If so, please provide date, executor, or trustee name:
2.	If your children are minors, have you selected a guardian?
3.	Do you plan to make significant lifetime gifts to your children?
4.	Do you wish to provide an inheritance to your children?
5.	Have you included charitable giving in your estate plan?