

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

Please complete this questionnaire and return a copy to us by mail or to [info@pfpg.com](mailto:info@pfpg.com) (you may request a secure link for returning by e-mail). We will hold this information in the strictest confidence. Thank you very much.

Your Name (s): \_\_\_\_\_ Age(s): \_\_\_\_\_

Your Job(s): \_\_\_\_\_

Your Child(ren), Age(s): \_\_\_\_\_

▪ **GOALS & OBJECTIVES**

What are your top financial concerns that are leading you to seek out comprehensive financial planning?

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Have you previously worked with a financial advisor/planner? \_\_\_\_\_

At what age do you expect to retire? You: \_\_\_\_\_ Your Spouse / Partner: \_\_\_\_\_

What life-goals do you want to accomplish once you achieve financial independence?

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How involved would you like to be in developing and implementing your financial plan? \_\_\_\_\_

▪ **YOUR FINANCES**

Current household income (*including salary, self-employment, rental income, Social Security, pension, annuity, trust funds*) \$ \_\_\_\_\_ / year

How much are you currently saving for retirement? \$ \_\_\_\_\_ / year

What is the approximate total value of your savings and investments (including IRAs and retirement accounts)?

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What else would be helpful for us to know about your current personal or financial situation and your financial goals / concerns?

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How did you learn about PFPG? \_\_\_\_\_