Date:

Please complete this questionnaire and return a copy to us by mail or to [info@pfpg.com](mailto:info@pfpg.com) before we chat. 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?

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?

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 (IRAs and retirement accounts)?

What else would be helpful for us to know about your current personal or financial situation and your financial goals / concerns? (Please feel free to continue on the back of this sheet if necessary.)

How did you learn about PFPG?