CLIENT QUESTIONNAIRE

Client Name

Advisor Name

Date

Eagle Strategies LLC

FAMILY & FRIENDS

Name	Spouse Name
Date of Birth ____ Desired Age of Retirement	Date of Birth ____ Desired Age of Retirement
How many children do you have?	Age(s) of Children

FINANCIAL PRIORITIES

Please place a number next to your top 6 priorities from the list below:

Client

____Creating Retirement Income
____Saving for Major Purchases
____Minimizing Taxes
____Insuring your assets
____Caring for Parents
____Planning for a Business
____Saving For College
____Managing a Budget
____Insuring your Life
____Providing a Legacy
____Contributing to Charity

Spouse

____Creating Retirement Income
____Saving for Major Purchases
____Minimizing Taxes
____Insuring your assets
____Caring for Parents
____Planning for a Business
____Saving For College
____Managing a Budget
____Insuring your Life
____Providing a Legacy
____Contributing to Charity

RETIREMENT ASSUMPTIONS

Current Living Expenses

Retirement Living Expenses

MISCELLANEOUS ASSUMPTIONS

Are you expecting any large lump sum payment in the future? (e.g. Sale of Business, Inheritance, etc.)

Year ____ Amount

GOALS

		Duration	Short Term/Long Term
Retirement	$		
Weddings/Celebrations	$		
Purchase of Property	$		
Education	$		
Travel	$		
Home Improvements	$		
Miscellaneous	$		

NET WORTH

	Joint	Client	Spouse
Real Estate/Property	$	$	$
Retirement Investments	$	$	$
Personal Investments	$	$	$
Other Investments	$	$	$
Business Interests	$	$	$
Total Mortgage Debt	$	$	$
Total Credit Card Debt	$	$	$
All Other Debt	$	$	$

INCOME & SAVINGS

Salary

Spouse Salary

Other Income

Spouse Other Income

Savings (Qualified)

Savings (Qualified)

Savings (Non-Qualified)

Savings (Non-Qualified)

Social Security Benefits

Social Security Benefits

PROTECTION

Client Death Benefit $

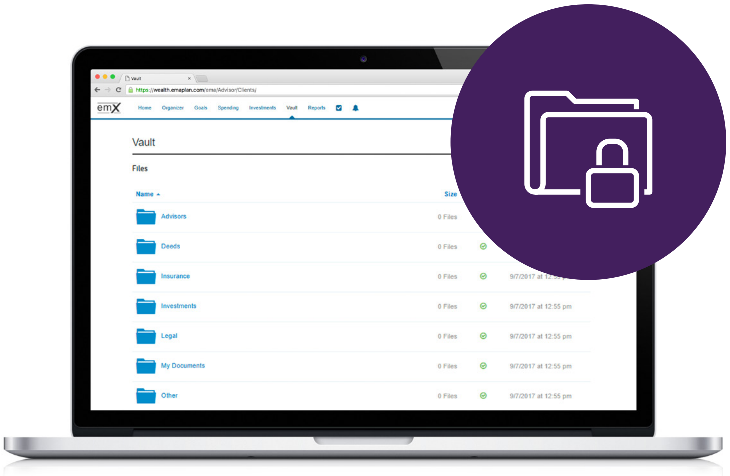
Spouse Death Benefit $

What other types of insurance policies do you have?

ADDITIONAL REMARKS

Is there any information you would like us to know which was not covered in this questionnaire?

VAULT CHECKLIST



LEGAL DOCUMENTS

☐ Wills
☐ Deeds
☐ Revocable & Irrevocable Trusts
☐ Power of Attorney
☐ Codicils (Supplements made to a Will)
☐ Living Wills/Health Directives
☐ Prenuptial Agreements
☐ Buy/Sell Agreements
☐ Contracts

BENEFITS

☐ Social Security Info
☐ Veteran's Administration Info
☐ Employment Benefits

INSURANCE POLICIES

☐ (Life, LTD, Disability, Medical, Car, Property)

BANK & INVESTMENT STATEMENTS

☐ Pensions, IRAs, Annuities, etc.
☐ Investment Accounts
☐ Stock Options/Certificates

LIABILITIES

☐ List of Credit Cards with Contact Information
☐ Mortgages
☐ Loans

TAXES

☐ Tax Returns
☐ W-2 Forms

IDENTIFICATION

☐ Birth Certificates
☐ Drivers Licenses
☐ Passports
☐ Social Security Cards

FAMILY

☐ Adoption Papers
☐ Medical Records
☐ Marriage License
☐ Pictures
☐ Audio Files
☐ Video Clips

PROPERTY

☐ Titles to Homes, Autos, Boats, etc.
☐ Warranties

PROFESSIONAL CONTACTS

Name	Relationship
Phone	Email
Name	Relationship
Phone	Email