

Date \_\_\_\_\_

Name \_\_\_\_\_



*Providing you with a personalized client experience based on your preferences is always our top priority.*

This short questionnaire will help us work together in a way that fits your needs. We'd also like to learn a little more about your interests and hobbies to further enhance your experience through meaningful milestone acknowledgement and event opportunities. No information will be shared outside of this office, as your privacy is a top concern.

**HOW DO YOU WANT TO WORK TOGETHER?**

Top financial goals:

1. \_\_\_\_\_

2. \_\_\_\_\_

Preferred method to handle ongoing service meetings:

\_\_\_\_\_ Face-to-face

\_\_\_\_\_ Phone

\_\_\_\_\_ Virtual (Microsoft Teams)

Preferred method of communication (please rank in order):

\_\_\_\_\_ Face-to-face

\_\_\_\_\_ Phone Call

\_\_\_\_\_ Email

\_\_\_\_\_ Text Message

Preferred meeting length:

\_\_\_\_\_ Short and sweet (30 minutes)

\_\_\_\_\_ Traditional (1 hour+)

Preferred meeting availability:

\_\_\_\_\_ Weekday a.m.

\_\_\_\_\_ Weekday p.m.

Social media:

Facebook \_\_\_\_\_

LinkedIn \_\_\_\_\_

Twitter \_\_\_\_\_

Other \_\_\_\_\_

Preferred document delivery:

\_\_\_\_\_ Paper copies

\_\_\_\_\_ Digital copies (via our secure website)

**HELP US PERSONALIZE AND ENHANCE YOUR EXPERIENCE**

Marital status:

\_\_\_\_\_ Married \_\_\_\_\_ Single \_\_\_\_\_ Other

Anniversary date \_\_\_\_\_

Spouse's name \_\_\_\_\_

Spouse's birthday \_\_\_\_\_

Kids:

Name \_\_\_\_\_ Birthday \_\_\_\_\_

Name \_\_\_\_\_ Birthday \_\_\_\_\_

Name \_\_\_\_\_ Birthday \_\_\_\_\_

(Continued...)

(Continued...)

**Education:**

Your alma mater \_\_\_\_\_  
Your graduation year \_\_\_\_\_  
Spouse's alma mater \_\_\_\_\_  
Spouse's graduation year \_\_\_\_\_

**Pets:**

Name \_\_\_\_\_ Type \_\_\_\_\_  
Name \_\_\_\_\_ Type \_\_\_\_\_  
Name \_\_\_\_\_ Type \_\_\_\_\_  
Name \_\_\_\_\_ Type \_\_\_\_\_

**Hobbies:**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Charities and volunteering:**

\_\_\_ Interested in volunteering  
\_\_\_ Interested in donating  
Organization names \_\_\_\_\_  
\_\_\_\_\_

**Bucket list items:**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**The perfect night/day out:**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Favorite sports teams:**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Favorite books / authors / music / bands:**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Financial education topics of interest:**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Favorite foods / restaurants and drink preferences:**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

If you would like to modify this form please click here for a Word version. .