

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 of communication (please rank in order):

- ____ Face-to-face ____ Phone Call
____ Email ____ Text Message

Preferred meeting availability:

- ____ Weekday a.m.
____ Weekday p.m.

Preferred document delivery:

- ____ Paper copies
____ Digital copies (via our secure website)

Preferred method to handle ongoing service meetings:

- ____ Face-to-face
____ Phone
____ Virtual (Microsoft Teams)

Preferred meeting length:

- ____ Short and sweet (30 minutes)
____ Traditional (1 hour+)

Social media:

- Facebook _____
Instagram _____
LinkedIn _____

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 _____



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:

