Confidential Wealth Planning Questionnaire

CARVER FINANCIAL SERVICES

We're ready to help youachieveyourvision.
After you fill out this questionnaire please email it to us at: carverfinancialservices@raymondjames.com

Your Information

Name

Date of Birth

Employer

Job Title

Salary

Work Phone

Home Phone

Mobile

Email

Date Retired / Planned

Spouse Information

Spouse Name

Spouse Date of Birth

Spouse Employer

Spouse Job Title

Spouse Salary

Spouse Work Phone

Spouse Mobile

Spouse Email

Spouse Date Retired / Planned

Household Information

Address

City

State

Zip

Children's Names & Ages

How did you hear of us?

Do You Have Any of the Following?

Financial Plan	☐ Yes	☐ No	Trust ***if yes, bring a copy***	☐ Yes	☐ No
Powers of Attorney	☐ Yes	☐ No	Will ***if yes, bring a copy***	☐ Yes	☐ No
Long-Term Care Insurance	☐ Yes	☐ No	Life Insurance	☐ Yes	☐ No
Umbrella Liability Insurance	☐ Yes	☐ No	College Savings Plan	☐ Yes	☐ No
Disability Insurance	☐ Yes	☐ No	Emergency Savings	☐ Yes	☐ No
Emergency Savings	☐ Yes	☐ No	Amount		
Estate Planning Attorney	☐ Yes	☐ No	Name		
CPA	☐ Yes	☐ No	Name		

Assets

Please bring a copy of all investment statements to your meeting.

Retirement Accounts

	Description	Amount	Contributions
1.			
2.			
3.			
4.			

Investment & Other Accounts

	Description	Amount	Contributions
1.			
2.			
3.			
4.			

Social Security Monthly Benefits

Your Social Security Benefit

Spouse Social Security Benefit

Pension Benefit Amounts

Your Pension Benefit

Spouse Pension Benefit

Debts

	Description	Balance	Rate %	Monthly Payment	Years Remaining
1.					
2.					
3.					
4.					

Your Goals

What is your primary reason for reaching out to Carver Financial Services?

Please list your top three financial and life objectives, goals, concerns or wishes.

1.

2.

3.

The information provided is an accurate representation of my financial position at this time.

Your Signature **Spouse Signature** **Date**

7473 Center Street Mentor, OH 44060 | CarverFinancialServices.com | Phone: 440.974.0808 | Fax: 440.974.3371