



CONFIDENTIAL QUESTIONNAIRE

Blazek Financial Planning

www.blazekfinancialplanning.com

Date: _____

CLIENT NAME (1):

CLIENT NAME (2):

Home Address: _____

Home Address: _____

City, State, Zip: _____

City, State, Zip: _____

Home Phone: _____

Home Phone: _____

Work Phone: _____

Work Phone: _____

Fax: (Home or Work) _____

Fax: (Home or Work) _____

Cell Phone: _____

Cell Phone: _____

E-mail: _____

E-Mail: _____

Birth date: _____

Birth date: _____

Contact me by (circle one) E-mail or Phone
Primary Contact Person during business hours? _____

What is the date of your marriage? _____

Are you now separated from your spouse? _____

Have you consulted or retained an attorney and if yes, who and when? _____

Are you currently providing financial support to anyone other than minor or college-age children?

Yes No

If yes, what is their relationship to you? _____

FAMILY MEMBERS Please list children and other dependants. Include any planned children.

<u>Name</u>	<u>Relationship</u>	<u>Date of Birth</u>	<u>Dependent</u>	<u>Resides?</u> (City & State)
_____	_____	/ /	Y N	_____
_____	_____	/ /	Y N	_____
_____	_____	/ /	Y N	_____
_____	_____	/ /	Y N	_____

Client Employer (1):

Title/Job: _____
Number of years with this employer? _____
Salary: _____
Self Employment Income: _____
Bonus/Commissions: _____
Other Earned Income: _____
TOTAL (Current Yr) = _____

Client Employer (2):

Title/Job: _____
Number of years with this employer? _____
Salary: _____
Self Employment Income: _____
Bonus/Commissions: _____
Other Earned Income: _____
TOTAL (Current Yr) = _____

ASSETS

(If you have this information in a format of your own design please feel free to omit this section. Please attach necessary documentation.)

Bank Accounts

<u>Bank Name</u>	<u>Checking [C], Savings [S], or Money [MM]</u>	<u>Ownership</u>	<u>Avg. Balance</u>
_____	_____	_____	\$ _____
_____	_____	_____	\$ _____
_____	_____	_____	\$ _____

CD's

<u>Where Held?</u>	<u>Interest Rate</u>	<u>Maturity Date</u>	<u>Ownership</u>	<u>Apx. Value</u>
_____	_____%	_____	_____	\$ _____
_____	_____%	_____	_____	\$ _____
_____	_____%	_____	_____	\$ _____

Attach a copy of your most current brokerage, mutual fund and retirement statements.

Please list below and estimate a value for any other investment assets not appearing on the list above or the statements provided:

PERSONAL PROPERTY

Estimated Value

Primary Residence _____
Personal Property (estimate) _____
Vehicle _____
Vehicle _____
Other _____
Other _____

LIABILITIES

<u>List Credit Cards Not Paid in Full Every Month</u>	<u>Interest Rate</u>	<u>Average Monthly Payment</u>	<u>Current Balance</u>
	%	\$	\$
	%	\$	\$
	%	\$	\$
	%	\$	\$

<u>Debts (Residence, Auto, Business, School)</u>	<u>Term</u>	<u>Interest Rate</u>	<u>Payment</u>	<u>Current Balance</u>	<u>Original Balance</u>
		%	\$	\$	\$
		%	\$	\$	\$
		%	\$	\$	\$
		%	\$	\$	\$

Have you received a copy of your credit report recently? Yes No

Please comment on your objectives in working with a financial professional

These items may be needed, should you engage our services:

- | | |
|-------------------------------------|----------------------------------------------|
| Tax Returns | Paycheck Stubs |
| Brokerage Account Statements | Life Insurance Policies |
| Retirement Plan Statements | Automobiles, Make, Model and Blue Book Value |
| Bank Account Statements | Listing of personal property |
| Credit Card and Mortgage Statements | Investment Property and Business Assets |

If you will be coming to our office for your financial consultation, please bring this completed form with you.

If we will be teleconferencing with you, please (1) keep a copy of your completed form, (2) fax or mail a copy to us at the following address:

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