

Questionnaire



Name _____

Account (if applicable) _____

Are you aware of what's coming in your bank account, going out of your bank account, and where it's going?

Yes! No.

Do you have a budget?

Yes! No.

Do you have any of the following financial products?

- | | |
|---|---|
| <input type="checkbox"/> Pension Fund | <input type="checkbox"/> Checking Account |
| <input type="checkbox"/> Investment Account | <input type="checkbox"/> 401k |
| <input type="checkbox"/> Mortgage | <input type="checkbox"/> Certificate of Deposit |
| <input type="checkbox"/> Auto Loan | <input type="checkbox"/> Personal Loans |
| <input type="checkbox"/> Credit Card | <input type="checkbox"/> Home Equity Loans |
| <input type="checkbox"/> Savings Account | <input type="checkbox"/> Money Market Account |



Do you have money set aside for 2 months worth of expenses?

Yes! No.

Do you find it difficult to pay off/minimize debt? (if applicable)

Yes! No.

How would you classify your current credit standing?

- No Credit Bad Credit (619 & under) Fair Credit (620-674) Good Credit (675+)

Would you like us to do a soft pull on your credit to analyze your current financial situation? Soft pulls have no negative impact on your credit score.

Yes! No.

What is your 5 year financial goal?
