California
RETIREMENT
Advisors

Personal Wealth Management For Retirement

Introduction Meeting

Confidential Questionnaire

*Note, please be sure to download this form to your desktop and open in Adobe Reader prior to filling out your information below

- "Retirment is a journey, not a destination. Travel with confidence."

Household Snapshot

Client 1	First	Last	D.O.B.	Age
	Nick name	Preferred e-mail	Cell Phone	
	Employer (former if retired)	Title/Position	Work Phone	Fax
Client 2	First	Last	D.O.B.	Age
	Nick name	Preferred e-mail	Cell Phone	
	Employer (former if retired)	Title/Position	Work Phone	Fax

Anniversary Date (if married)	How were you referred to us?
Home Address	

City	State	Zip	Home Phone

Family & Financial Snapshot

Do you have children? If yes, please list ages:

Any grandchildren? If yes, please list ages:

Do you prepare your own taxes?	Yes ☐	No ☐
Do you have long-term care insurance?	Yes ☐	No ☐
Do you have a will or living trust?	Yes ☐	No ☐
Do you have life insurance?	Yes ☐	No ☐
Do you have an umbrella policy?	Yes ☐	No ☐

Current Loan Type	Balance	Monthly Payment

Retirement Information	Client 1	Client 2
Are you already retired?		
Actual/projected retirement date		
Total monthly employment income		
Estimated/actual monthly pension		
Other estimated/actual monthly pension		
Total monthly rental income(s)		
Any other recurring income		
Estimated /actual Social Security		
Monthly contributions to investments		
Estimated monthly expenses		
Are you supporting any parents?		