



*“Wealth is the ability to fully experience life”*

- *Henry David Thoreau*

## **CLIENT WELCOME PACKAGE:**

### **ATTACHMENT I. Financial Snapshot**

**PERSONAL & CONFIDENTIAL**

## **HOME PREP EXERCISES:**

Enclosed you will find a package of self-reflective exercises and worksheets.

I invite you to empower your financial future by created personal time to reflect upon and complete these set of questions. You may elect to use these worksheets merely for your own self-reflection initial financial planning. However, if you are willing to utilize and share your reflections and worksheets with me more directly, you will empower our team work and capacity for creating a much more potent, responsive and effective financial road map on your behalf.

You can engage in these exercises by doing one or two when you have a few minutes – or you can do them all together at one time. It is our hope that you become quite intrigued with some of these self-reflective questions, and that you choose to engage them quite fully. Toward that end we have also provided some areas of deeper self-study in our Resources section.

Please do accept the unique invitation of our customized services by truly engaging and sharing with us what you discover about yourself though this set of exercises. The more fully we know you, the more powerfully successful will be the road map we create as well as your freedom of life enjoyment along the way.

## **PERSONAL & CONFIDENTIAL**

All information you share with us, remains personal, private, and confidential.



## **ATTACHMENT I: FINANCIAL SNAPSHOT**

1. Personal Information Sheet (2 minutes)
2. Current Income/Expense Snapshot (25 minutes)
3. Other Financial Commitments and Considerations (15 minutes)
4. Notes (4 minutes)

In this section, you will be answering a few “broad brush stroke” questions about your financial picture; anticipated future financial considerations; and offer some basic background information about yourself to help us start to build an informed foundation.

In Part II, you will be invited to delve more deeply into beliefs, attitudes, dreams, and roadblocks that may help or hinder your life style and financial goals.

The two parts, together, form a very unique and powerful basis for the integrated financial GPS system we will be creating together and on your behalf.

We will go into far more depth than these initial questions when we begin the actual financial planning documents. For now, these questions will give us a working snapshot informing us of key areas in which to next focus.

## **PERSONAL & CONFIDENTIAL**

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**I-1 Personal Information Sheet (2 minutes)**

Please provide all of the following personal information

**Full Name:** \_\_\_\_\_

**Address:** \_\_\_\_\_  
\_\_\_\_\_

**Work Phone:** \_\_\_\_\_ **Home Phone:** \_\_\_\_\_

**Cell Phone:** \_\_\_\_\_

**Primary Email Address:** \_\_\_\_\_

**Date of Birth:** \_\_\_\_\_

**Marital Status (M/S/D/W) Spouse's Name (if applicable):** \_\_\_\_\_

**Number Currently Living in Your Household:** \_\_\_\_\_

**# of Children: \_\_\_\_\_ & Ages:** \_\_\_\_\_

**Your Trust Attorney Company Name:** \_\_\_\_\_

**Your CPA Company Name:** \_\_\_\_\_

**Where Do You Bank?** \_\_\_\_\_

**Your Brokerage Firm:** \_\_\_\_\_

**Date of Financial Plan:** \_\_\_\_\_ **Date of Last Review:** \_\_\_\_\_



## I-2 Current Expense/Income Snapshot (E/I Worksheet 25 minutes)

Please list your current expenses and income here. This information will enable me to know where to delve more deeply as needed in our future work together. You only need rough in the basics here (being accurate as you can). We will fine tune and be much more specific in our future work together. This is just to help give us a broad picture to start with.

- 1) Annual Household Income: \$ \_\_\_\_\_
- 2) Total Average Monthly Expenses: \$ \_\_\_\_\_
- 3) Current “Net Worth”: \$ \_\_\_\_\_
- 4) Amount of Current Liquid Assets (i.e., Total in Bank Accounts): \$ \_\_\_\_\_
- 5) Total Amount of all Debt (Mortgage, Credit Card, Other Combined) \$ \_\_\_\_\_
- 6) List What You Consider to be Your “True Currencies”
  
- 7) Using a Scale from 1-10 (1 Being Not At All and 10 being Totally) how comfortable are you right now with your wealth?  

1...2...3...4...5...6...7...8...9...10
- 8) What areas of wealth building and money management most concern you?
  
- 9) What areas of wealth building and money management most interest you?





### **I-3 Other Financial Commitments and Considerations (15 minutes)**

Please list any upcoming or financial commitments or considerations that are anticipated or expected within the next 3-5 years (such as college costs; elder care; inheritance; sale of business; sale of other investments etc.) This is simply a “big picture snapshot” for now. We will make a more detailed document and formulation at a meeting together in the near future.

**LIST ANTICIPATED EXPENSES:** \_\_\_\_\_ **APPROX \$**

**LIST ANTICIPATED INCOME** \_\_\_\_\_ **APPROX \$**

## **I-4 Notes**

Please use this space for any additional thoughts, questions, or considerations.