

**Client Questionnaire**

*Please complete and email to us 3 days before your appointment.*

Name(s): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

1. Please comment on specific financial topics and questions you’d like to go over in the meeting:
2. Since our last meeting, has your financial situation or any of your financial goals or priorities changed significantly? For example, a new job or salary, new baby or other dependent, change to housing situation, etc. Please list current salaries and other material changes.
3. (Optional) What were the biggest successes you experienced from implementing your initial financial plan prepared by Mindful Money Financial Counsel? What were your biggest challenges?

Success:

Challenges:

1. Please update your net worth statement. You can either fill out the section below with the latest balances, or log into our financial planning software, Right Capital, and link accounts. You can find the log-in link at [www.mindfulmoneyfinancial.com/resources](http://www.mindfulmoneyfinancial.com/resources). If you haven’t established a username and password yet, please email us and we will send you the link to sign-up.

|  |  |
| --- | --- |
| **Assets** |  |
| ***Liquid assets (cash or cash equivalents)*** |  |
| Checking account(s) |  |
| Savings account(s) |  |
| ***Investment accounts*** |  |
| Non-retirement stocks, bonds and mutual funds |  |
| Current employer stock options and/or RSUs (net) |  |
| ***Retirement accounts*** |  |
| Current employer retirement plan(s) |  |
| Previous employer(s) retirement plan(s) |  |
| Roth IRA(s) |  |
| Traditional, Rollover, or SEP IRA(s) |  |
| Other: |  |
| ***Personal use and/or specific purpose assets*** |  |
| Primary residence |  |
| Second home/investment property(ies) |  |
| Car(s) |  |
| Business value |  |
| Education savings accounts |  |
| Health savings accounts |  |
| Other: (art, jewelry, furniture, etc.) |  |
|  |  |
| **Total Assets** |  |
|  |  |
| **Debt** |  |
| Credit card(s) |  |
| Student loan(s) |  |
| Car loan(s) |  |
| Primary residence mortgage(s) |  |
| Mortgage(s) Second home |  |
| Other: |  |
|  |  |
| **Total Debts** |  |
|  |  |
| **Financial Net Worth** |  |

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