

First/Last Name:

SSN:

DOB:

Children			

How did you hear about us?	<input type="radio"/> Advertisement <input type="radio"/> Mailing <input type="radio"/> Referred <input type="radio"/> Seminar/Event/Networking <input type="radio"/> Yellow Pages
	<input type="radio"/> Other: _____
	Who can we thank for the referral? _____

Accounting	Do you currently work with a Certified Public Account? <input type="radio"/> Yes <input type="radio"/> No
	Have you worked with an accountant in the past? <input type="radio"/> Yes <input type="radio"/> No
	Do you presently prepare your own income tax returns? <input type="radio"/> Yes <input type="radio"/> No

Planning	Do you currently work with a Certified Financial Planner? <input type="radio"/> Yes <input type="radio"/> No
	Have you worked with a financial advisor in the past? <input type="radio"/> Yes <input type="radio"/> No
	Do you presently do your own financial planning? <input type="radio"/> Yes <input type="radio"/> No

Business	Are you a business owner? <input type="radio"/> Yes <input type="radio"/> No
	If you answered Yes, please answer the "Business Survey" questions on the following page.

The focus of today's meeting is: Personal Business Both

What specifically do you want to be sure we discuss during this meeting?