Compass Financial Consulting, LLC

"Providing Financial Direction"

Initial Questionnaire

Name - Husband ______________________

Name - Wife ______________________

NET WORTH - WHAT IS THE BALANCE OF YOUR:

Total in Checking Accounts $ ______________________

Total in Investment Accounts $ ______________________

Total in Retirement Accounts $ ______________________

Other Investments $ ______________________

Total Mortgage & Other Debt $ ______________________

CASH FLOW - HOW MUCH IS/ARE YOUR ANNUAL:

Gross Income(s) (Salary, etc.) $ ______________________

Charitable Giving $ ______________________

Taxes (Federal & state) $ ______________________

Savings (401k, etc.) $ ______________________

OTHER ITEMS

Have you ever worked with a financial planning firm before? YES / NO

What areas of your financial life prompted your call to us? Circle as many as you like.

INCOME&EXPENSES / INVESTMENTS/ DEBT / RETIREMENT / TAXES / GIVING / INSURANCE / OTHER

What is the best time and phone number to call as we seek to follow up with you in regards to this questionnaire?

Time:_____ AM / PM Phone Number:______________________

Thank you for your interest in Compass Financial Consulting, LLC!
