

# Asset Questionnaire

Internal Use Only

Date/Time Consult: \_\_\_\_\_ Consultant: \_\_\_\_\_ H.N.W. Dept:

## BASIC INFORMATION

Date & Location:

Client Name:  Age:

Spouse Name:  Age:

Phone Number: *Home:*  *Mobile:*

Fax Number:  Email:

Address:

## FAMILY INFORMATION

Marital Status: *Single*  *Married*  *Widowed*  *Divorced*

Children:  
(include names  
and ages)

<input type="text"/>	<input type="text"/>
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If you, your spouse, or children are non-U.S. citizens, please list below:

## EMPLOYMENT INFORMATION

Occupation & Wage: (For Client, indicate source as W-2 or 1099.)

Other Income Sources: (List source and annual amount.)

Occupation & Wage: (For Spouse, indicate source as W-2 or 1099.)

Are you self-employed? Yes  No

Is your spouse self-employed? Yes  No

## RETIREMENT PLAN INFORMATION

Types of Plans and Amounts in Each Plan:

<i>Client:</i>	<i>Spouse:</i>
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## REAL ESTATE INFORMATION

Primary Residence:	Value \$	Equity \$	State
2nd Residence:	Value \$	Equity \$	State

## INVESTMENT REAL ESTATE

Property	State	Value \$	Equity \$	% Owned	Flip/ Hold	SFR/ Multi	Ownership

Definitions:

FLIP: Properties you are holding for less than 2 years, rehabs, new builds.  
 HOLD: Investment property, land, other properties to be held longer than 2 years.  
 SFR: Single family residences.  
 MULTI: Duplexes and above.  
 OWNERSHIP: How is it titled? — In an entity, co-tenants, joint tenancy, etc.

Do you have additional properties?    Yes     No

*Please attach additional schedule of properties if answer is "yes."*

**LIQUID ASSETS (Do Not Include Retirement Accounts)**

Checking Accounts:

Value \$

Savings Accounts:

Value \$

Brokerage Accounts:

Value \$

Other Liquid Assets: *(include asset value and description)*

**PRIVATE BUSINESS INTERESTS**

Business Description:

Form of Business:

State Where it is Filed:

List Additional Businesses: *(attach schedule if necessary)*

**LIFE INSURANCE**

Client:

Spouse:

**ESTATE PLAN**

Do you have a Will?:

If yes, when was it created?:

Do you have a Living Trust?:

If yes, when was it created?:

**STRUCTURE DIAGRAM**

