



# PROSPERITY WEALTH PLANNING

## New Client Confidential Questionnaire

Please fill in the information and return to [contactus@prosperitywealthplanning.com](mailto:contactus@prosperitywealthplanning.com) to schedule an appointment.

Name \_\_\_\_\_

Date \_\_\_\_\_

Prosperity Wealth Planning  
3780 Kilroy Airport Way, Suite 200  
Long Beach, CA. 90806  
Toll Free (877) 878-7860  
(949) 637-4130  
[www.prosperitywealthplanning.com](http://www.prosperitywealthplanning.com)

All information is kept confidential in accordance with our privacy policy

**Personal Information:**

**Client:**

Full Legal Name:

Date of Birth:

Street Address:

City, State, Zip:

Email Address:

Home Phone:

Mobile:

Work:

Employer:

Occupation:

Date of Hire:

Annual Income:

Bonus Income:

Other Income:

**Co-Client:**

Full Legal Name:

Date of Birth:

Street Address:

City, State, Zip:

Email Address:

Home Phone:

Mobile:

Work:

Employer:

Occupation:

Date of Hire:

Annual Income:

Bonus Income:

Other Income:

**Children:**

**Child 1**

Full Name:

Date of Birth:

Marital Status:      Yes      No

Number of Children:

**Child 2**

Full Name:

Date of Birth:

Marital Status:      Yes      No

Number of Children:

**Child 3**

Full Name:

Date of Birth:

Marital Status:      Yes      No

Number of Children:

**Child 4**

Full Name:

Date of Birth:

Marital Status:      Yes      No

Number of Children:

**Getting to Know You:**

How did you hear about us?

What qualities are you looking for in a financial planner?

Do you have any upcoming life events?

List your 3 most critical financial planning priorities:

1)

2)

3)

## **Financial Information**

### **Cash Equivalents:**

Checking and Savings Accounts:	\$
Money Market Accounts:	\$
Certificates of Deposit:	\$
Life Insurance Cash Value:	\$

### **Stocks & Bonds (Please attach separate statements for each)**

1)	\$
2)	\$
3)	\$
4)	\$

### **Retirement Accounts:**

IRA Accounts:	\$
Roth IRA Accounts:	\$
401(k) Accounts:	\$
Deferred Compensation Plans:	\$
Other Retirement Plans:	\$

### **Real Estate:**

Primary Residence:	\$
Secondary Residence:	\$
Other Real Estate:	\$

**Additional Assets**

- 1) \$
- 2) \$
- 3) \$
- 4) \$

**Liabilities:**

- Primary Home Mortgage: \$
- Secondary Mortgage: \$
- Home Equity Line of Credit: \$
- Auto Loans: \$
- Other Loans: \$

**Credit Cards:**

- 1) \$
- 2) \$
- 3) \$
- 4) \$

**Additional Debt:**

- 1) \$
- 2) \$



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