Financial Services of America

F.O.R.M GATHERING TEMPLATE

Client Name: ____

Representative Name: ______________________________________

FAMILY

Spouse (who, how long, how they met, milestone anniversary):

Children (names, ages, interests, accomplishments):

Grandchildren (names, ages, interests, accomplishments):

Pets (how many, what type, how long, names):

Health Issues or other Special Situations (related to client, spouse or their children):

Other (specify):

OCCUPATION

Occupation (client and spouse, for how long, where):

Retirement (retired or retirement goal date of client and of spouse):

Business Owner (type of business, how long, long-term intentions):

Professional Education and/or Credentials (client and spouse):

Professional Successes and/or Accomplishments (client and spouse):

Other (specify):

RECREATION

Sports & Recreation (play, coach, watch, fan of):

Personal Interests (hobbies and interests):

Music and Reading Interests:

Favorite Traditions (occasions, celebrations, reunions):

Travel (seasonal/annual, favorite place/boating/camping etc):

Charities and other causes supported (volunteer and support):

Service Clubs & Organizations (member or participant):

Alumni of (Universities, associations) and Other:

MONEY

Financial Goals & Objectives:

Tax Planning:

Retirement Planning:

Cash Flow Planning:

Educational Savings:

Family Security:

Estate Planning:

Investment Strategies:

MONEY

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