

## CONFIDENTIAL QUESTIONNAIRE FOR:

The purpose of this financial questionnaire is to am objective assemble a summary view of your financial situation. Is is important to be thorough and list all your information to ensure that any options we discuss are appropriate for your unique situation. All information is strictly confidential. Please provide the following supporting documents:

Paycheck Stubs (2 months)

Statements on all Investments/Securities

Bank Statements (2 months)

Mortgage Statements (2 months)

Tax Return most recent years (Personal and Business)

Drivers License

Insurance - Outline Policy & Coverages  
(Life, Auto, Home, etc.)

Company Benefit Statement of Summary

Company Benefit Booklet

Social Security Earnings Statement

Wills & Trust Documents

### Current Advisers

|                    |                |               |                |
|--------------------|----------------|---------------|----------------|
| CPA:               | Contact Number | Stock Broker: | Contact Number |
| Banker:            | Contact Number | Attorney:     | Contact Number |
| Insurance Agent:   | Contact Number | Attorney:     | Contact Number |
| Financial Advisor: | Contact Number | Other:        | Contact Number |

*Andrew Windham may contact the above referenced advisers for any additional information needed to complete the planning process on my behalf.*

*Andrew Windham may NOT contact the above referenced advisers for any additional information needed to complete the planning process on my behalf.*

**Signature:**

**Date:**

### Current Tax Rates

Current Effective  
Income Tax Rate %

Retirement Effective  
Tax Rate %

Expected  
Inflation Rate

What age would you like to obtain financial independence?

At financial independence what would you want in today's dollars as a monthly income?

**Personal Information & Income**

| Name | Date of Birth | Contact Phone# |
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