



EARLY
MCCLINTIC
MCMILLAN

WEALTH SERVICES

Client Interest Questionnaire

PLEASE COMPLETE AND RETURN THE FOLLOWING QUESTIONNAIRE. THE INFORMATION YOU PROVIDE WILL BE KEPT CONFIDENTIAL.

PERSONAL/FAMILY INFORMATION

Name: _____

Spouse/Partner Name: _____

Birthday: _____

Spouse/Partner Birthday: _____

Wedding Anniversary Date: _____

Future Wedding Date: _____

What is your preferred method of contact?

- Home Phone: _____
- Cell Phone: _____
- Work Phone: _____
- Email: _____

Current Employer:

Spouse/Partner Employer:

Client Schools Attended:

Spouse/Partner Schools Attended:

Children's Names:

Children's Birthdays:

Name of Pet(s):

Type of Pet(s):

PERSONAL PREFERENCES

CLIENT

SPOUSE/PARTNER

Favorite Wines or Spirits: _____

Favorite Restaurants/Cuisines: _____

Favorite Snacks/Candy: _____

Favorite News Publications/Websites: _____

Favorite Authors/Books: _____

Favorite TV Shows/Programs: _____

Favorite Type of Music: _____

Favorite Hobbies/Leisure Activities: _____

Favorite Sports Teams: _____

COMMUNITY SUPPORT/INVOLVEMENT

Which Groups/Organizations/Clubs/Associations are you a member of? _____

Which charitable organizations or Local businesses do you support? _____

LEISURE ACTIVITIES/HOBBIES

Which of the following are of interest to you:

- Sports/Recreations Health/Wellness Volunteer opportunities Family Friendly Events/Activities
- Arts/Entertainment Travel/Sight Seeing Food/Wine Personal Growth/Enrichment
- Lawn/Garden Outdoor/Adventure Water activities/Boating Theater/Live Performance

Other: _____

MILESTONES Please select any of the following financial milestones or concerns that you may be facing now or in the near future:

- Major purchase College Funding Starting a family Debt reduction
- Retirement Financial windfall Divorce Starting/ending a business
- Job/Career change Marriage Illness/Death Job loss

Other: _____

FINANCIAL TOPICS Which financial topics are you interested in:

- Market/Economic Updates Planning for retirement College Planning/Funding
- Making retirement dollars last Protecting income/assets Preserving/Distributing assets
- Managing investments Tax planning Small business ownership