

Lessard Wealth Management

Katrina C. Lessard, CFP®, AEP®

Founder & CCO

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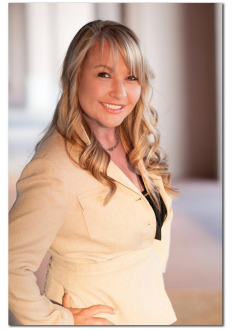
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Complimentary Consultation Questionnaire





Personal Information

Date:

Mr.

Mrs.

Ms.

First Name	M. I.	Last Name
Birth Date	Age	Social Security Number
Street Address		
City/Town	State/ZIP	
Home Phone	Home FAX	
Cellular Phone	Email Address	
Employment		
Occupation	Employer	
Employer Address	Phone	
Fax	Email Address	
Education		
School	Degree	Affiliations (clubs, activities, sports)
High School		
College		
Graduate School		
Military Service		
Dates of Active Duty	Branch	Type of Discharge
Notes		



Personal Information

Mr.

Mrs.

Ms.

Spouse/Partner		
First Name	M. I.	Last Name
Birth Date	Age	Social Security Number
Cellular Phone	Email Address	
Spouse/Partner's Employment		
Occupation		Employer
Employer Address		Phone
Fax	Email Address	
Spouse/Partner's Education		
School	Degree	Affiliations (clubs, activities, sports)
High School		
College		
Graduate School		
Spouse/Partner's Military Service		
Dates of Active Duty	Branch	Type of Discharge
Children/Grandchildren/Other Dependents		
Name	Birth Date	Relationship

Please attach any additional information on a separate sheet.



Personal Information

Contacts

Tax Preparer	
Name	Address
Phone	Email
Attorney	
Name	Address
Phone	Email
Insurance Agent	
Name	Address
Phone	Email
Investment Advisor	
Name	Address
Phone	Email
Notes	
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Financial Concerns

"Money is better than poverty, if only for financial reasons."
~ Woody Allen

Please rate how important the following financial concerns are to you, 5 being the most important, 1 being the least important.

Concern	1	2	3	4	5
Plan a budget					
Start a short-term savings plan (e.g., to buy a house, or take a vacation)					
Create or update an education savings plan for my children					
Create or update a retirement savings plan					
Create or update an investment plan					
Create or update an estate plan					
Start a new business					
Review tax efficiencies					
Analyze my insurance needs					
Organize my financial documents					
Notes					



Financial Goals Worksheet

"Goals are dreams with deadlines."
~ Diana Sharf Hunt

Please complete this worksheet for your two most important short-term, medium-term, and long-term financial goals.

Goal	By When?	Amount
Short Term (within 3 years)		
Medium Term (3-7 years)		
Long Term (over 7 years)		
Notes		



Financial Information

Assets Use current fair market value		Liabilities	
Cash and CDs		Mortgages	
Primary Residence		Other Home Loans	
Second Residence		Vehicle Loans	
Automobiles		School Loans	
Other Vehicles		Business Loans	
Business Interests		Other Loans	
Retirement Accounts		Notes	
Investments		Credit Cards	
Fine Art, Jewelry, Collectibles		Medical Bills	
Other Personal Property		Taxes	
Any Other Assets		Any Other Liabilities	
Total Assets		Total Liabilities	
		Net Worth Total assets minus total liabilities	

Are any liquid assets earmarked as an "emergency fund"?

Yes

No

If yes, how much?

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Notes



Financial Information

Cash Flow

Monthly Income		Monthly Expenses	
Salary		Mortgage Payments	
Bonuses, Commissions		Loan Payments	
Pension Income		Credit Card Payments	
Annuity Income		Utilities	
Rental Property Income		Food, Meals	
Interest, Dividends		Medical Expenses	
Alimony		Vehicle Expenses	
Child Support		Insurance Payments	
Income from a Trust		Personal Care	
Social Security		Entertainment	
Any Other Income		Any Other Expenses	
Total Monthly Income		Total Monthly Expenses	

Do you have a monthly budget?

Yes

No

If yes, are you able to stick to it?

Yes

No

Notes

Securities offered through LPL Financial, Member FINRA / SIPC . Investment advice offered through Lessard Wealth Management, a registered investment advisor and separate entity from LPL Financial.



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