

Law Office of Keith R Miles, LLC

CONFIDENTIAL

FINANCIAL SNAPSHOT CLIENT QUESTIONNAIRE

This questionnaire is designed to help us gather the information necessary to conduct our initial meeting. *Those questions that do not apply to you, your family, or your financial situation may simply be ignored.* Please feel free to attach additional pages where space is insufficient, or to provide other information you feel is relevant.

DATE:

NAME AND CONTACT INFORMATION

Person Completing Form:

(first)

(middle)

(last)

Home Address:

Relationship to Client:

Client's Full Name:

(first)

(middle)

(last)

Spouse's Full Name:

(first)

(middle)

(last)

Home Address:

Client

Spouse

Telephone Numbers:

(home)

(home)

(cell)

(cell)

Date of Birth:

Former/Maiden Names:

US Citizen?: Yes No

Yes No

Social Security Number:

INCOME

In completing the following section, use the “name on the check” rule; that is, the person whose name appears on the payment vehicle is the “owner” of the income.

A. FIXED MONTHLY INCOME

	<u>Client</u>	<u>Spouse</u>	<u>Joint</u>
1. Social Security:	\$ _____	\$ _____	\$ _____
2. R.R. Retirement:	\$ _____	\$ _____	\$ _____
3. Pension:	\$ _____	\$ _____	\$ _____
4. _____ :	\$ _____	\$ _____	\$ _____
5. _____ :	\$ _____	\$ _____	\$ _____
6. _____ :	\$ _____	\$ _____	\$ _____
_____ :	_____	_____	_____

B. NON-FIXED MONTHLY INCOME

	<u>Client</u>	<u>Spouse</u>	<u>Joint</u>
1. Interest:	\$ _____	\$ _____	\$ _____
2. Dividends:	\$ _____	\$ _____	\$ _____
3. _____ :	\$ _____	\$ _____	\$ _____
4. _____ :	\$ _____	\$ _____	\$ _____
5. _____ :	\$ _____	\$ _____	\$ _____

C. TOTALS (A thru B):	\$ _____	\$ _____	\$ _____
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ASSETS AND RESOURCES

A. CASH AND BANK ACCOUNTS (CDs, Checking, Savings, etc.)

(Please provide copies of statements)

<u>Name of Bank/Branch</u>	<u>Account No.</u>	<u>Type of Account</u>	<u>Balance/Value</u>	<u>How Title Held</u>
Big Bank/Main St. <small>(sample)</small>	xxx-xxxx	Savings	\$ xx,xxx.xx	Jointly w/ son
_____	_____	_____	\$ _____	_____
_____	_____	_____	\$ _____	_____
_____	_____	_____	\$ _____	_____
_____	_____	_____	\$ _____	_____
_____	_____	_____	\$ _____	_____

B. SECURITIES (Bonds, Marketable Securities, etc.)

(Please provide copies of statements)

<u>Name of Company</u>	<u>Type of Sec.</u>	<u># Shares/Face Val.</u>	<u>Cost</u>	<u>Current Val.</u>	<u>How Title Held</u>
Acme Corp. <small>(sample)</small>	Common <small>(or Preferred)</small>	xx Shares	\$ x,xxx.xx	\$ x,xxx.xx	Sole owner
_____	_____	_____	\$ _____	\$ _____	_____
_____	_____	_____	\$ _____	\$ _____	_____
_____	_____	_____	\$ _____	\$ _____	_____
_____	_____	_____	\$ _____	\$ _____	_____
_____	_____	_____	\$ _____	\$ _____	_____

C. RETIREMENT ACCOUNTS (IRAs, Keoghs, etc.)

(Please provide copies of statements and beneficiary designations)

<u>Name of Institution</u>	<u>Account No.</u>	<u>Owner</u>	<u>Beneficiary</u>	<u>Date Est.</u>	<u>Current Value</u>
Big Broker <small>(sample)</small>	xxx-xxxx	Client	Spouse	Jan, 1970	\$ xx,xxx.xx
_____	_____	_____	_____	_____	\$ _____
_____	_____	_____	_____	_____	\$ _____
_____	_____	_____	_____	_____	\$ _____

_____ \$
 _____ \$

D. REAL ESTATE

(Please provide copies of deeds and most recent tax bills)

<u>Description (Location)</u>	<u>Cost (Basis)</u>	<u>Market Value</u>	<u>Mortgage Bal.</u>	<u>How Title Held</u>
123 Know Way (sample)	\$ xxx,xxx.xx	\$ xxx,xxx.xx	\$ xx,xxx.xx	Joint tenant
_____	\$ _____	\$ _____	\$ _____	_____
_____	\$ _____	\$ _____	\$ _____	_____
_____	\$ _____	\$ _____	\$ _____	_____
_____	\$ _____	\$ _____	\$ _____	_____
_____	\$ _____	\$ _____	\$ _____	_____

E. PERSONAL PROPERTY

	<u>Market Value</u>	<u>How Title Held</u>
Home Furnishings:	\$ _____	_____
Cars, RVs, Boats, etc.:	\$ _____	_____
Jewels, Furs, etc.:	\$ _____	_____
_____	\$ _____	_____
(other: collectibles, etc.)		
_____	\$ _____	_____
_____	\$ _____	_____

F. BUSINESS INTERESTS

If the person needing long-term care has any business interests, please provide a short description giving the name, location, percentage owned, names and relationship of co-owners, and the form of ownership (i.e., sole proprietorship, closely held corporation, partnership, etc.). Please bring a copy of any agreements, financial statements, etc.

