

The purpose of this form is to help us better understand your needs. This form is designed to make your meeting with Bucholtz Consulting as productive as possible by gathering basic information before we meet.

Please complete this First Meeting Financial Organizer and return to our office one day prior to your first meeting.

Fax: (440) 944-8080

Email: info@bucholtzconsulting.com

Mail: Bucholtz Consulting, 2786 SOM Center Road, Suite 102, Willoughby Hills, Ohio, 44094

(If needed we can take your information over the phone, please call (440) 944-7070 and we will assist you.)

Please bring the following financial information to your initial meeting:

- Recent tax return
- Recent investment statements
- Pension or retirement plan information

If you have any questions as you work through these materials, please contact us at (440) 944-7070 or (800) 944-3134. Bucholtz Consulting maintains strict confidentiality. Securities and advisory services offered through Commonwealth Financial Network, Member FINRA/SIPC, a Registered Investment Adviser.

Your Name _____ Date of Birth ___ / ___ / ___

Spouse Name _____ Date of Birth ___ / ___ / ___

Street Address _____

City _____ State _____ Zip _____

Phone Cell _____ Home _____ Email _____

Do you have children? Yes No If yes, please provide their names and birthdates:

Name _____ Date of Birth ___ / ___ / ___

Name _____ Date of Birth ___ / ___ / ___

Name _____ Date of Birth ___ / ___ / ___

Are you currently employed? Yes No If yes, please provide the name of your employer and job title:

Company Name _____ Job Title _____

Work Phone _____ Email _____

Is your spouse currently employed? Yes No If yes, please provide the name of their employer and job title:

Company Name _____ Job Title _____

What is your approximate annual income from all sources?

Your Income: less than \$50,000 \$50,000 to \$100,000 \$100,000 to \$250,000 greater than \$250,000

Spouse Income: less than \$50,000 \$50,000 to \$100,000 \$100,000 to \$250,000 greater than \$250,000

What prompted you to contact Bucholtz Consulting? _____

What would you like your initial meeting to focus on? _____

What are your biggest financial concerns? _____

Do you currently work with a CERTIFIED FINANCIAL PLANNER™ Practitioner? Yes No

Do you have a will? Yes No When was your will last updated? _____ / _____
(mo) (year)

Do you have a trust? Yes No Not Sure

Do you use an accountant to prepare your taxes? Yes No

If yes, what accountant do you use? _____

Have you had a tax planning appointment in the past year? Yes No

Have you written out your long term financial goals? Yes No Not recently

What is the approximate value of all your CD's, savings, and checking accounts?

- less than \$50,000 \$50,000 to \$150,000 \$150,000 to \$250,000
 \$250,000 to \$500,000 \$500,000 to \$1,000,000 More than \$1,000,000

What is the approximate value of all your retirement plans and IRA's? (401k, etc)

- less than \$50,000 \$50,000 to \$150,000 \$150,000 to \$250,000
 \$250,000 to \$500,000 \$500,000 to \$1,000,000 More than \$1,000,000

Do you have an ownership interest in a business? Yes No

If yes, please list type of business and business name – Type of Business _____

Business Name _____

Do you expect to receive any pension benefits? Yes No

Do you hold any notes payable? (Money owed to you) Yes No

What is the approximate market value of your home?

- Less than \$150,000 \$150,000 to \$300,000 \$300,000 to \$750,000 More than \$750,000

Do you have a mortgage on your home? If yes, what is the balance on the loan and the interest rate?

Loan Balance _____ Interest Rate _____

Please indicate any other debt you currently have –

Home Equity _____ Second Mortgage _____ Car Loan _____

Credit Card Debt _____ Business Debt _____ Other _____
(If you carry a balance)

Do you own any other real estate? Yes No Vacation Property/Second Home Investment Property

Do you have any life insurance? Yes No

Has your life insurance been reviewed in the last five years? Yes No I/We do not have or need life insurance

Do you have disability insurance? Yes No

Thank You!