



# PRESPER FINANCIAL ARCHITECTS

## QUESTIONNAIRE

### GENERAL INFORMATION

Client (1) Name: \_\_\_\_\_

Preferred Name or nickname: \_\_\_\_\_

Date of Birth: \_\_\_\_\_

Employer: \_\_\_\_\_

Occupation: \_\_\_\_\_

Home Address: \_\_\_\_\_

Preferred Phone Number: \_\_\_\_\_

Email Address: \_\_\_\_\_

Check here to receive our weekly market commentary email

Client (2) Name: \_\_\_\_\_

Preferred Name or nickname: \_\_\_\_\_

Date of Birth: \_\_\_\_\_

Employer: \_\_\_\_\_

Occupation: \_\_\_\_\_

Home Address: \_\_\_\_\_

Preferred Phone Number: \_\_\_\_\_

Email Address: \_\_\_\_\_

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### ASSETS/DEBTS (estimated values)

Home:  0-\$100k  \$100-250k  \$250-500K  over \$500k

Is there a Mortgage Balance on your home?  yes  no

Total Debts (not including mortgage):  0-\$25K  \$25-50k  \$50-100K  over \$100k

Total Investment/Savings:  0-\$100k  \$100-250k  \$250-500K  over \$500k  
(please include: bank accounts, brokerage accounts, IRA's, 401k, 403-B etc.)

Do you have a Pension?  yes  no

### QUESTIONS

How did you hear about our firm? \_\_\_\_\_

How can we help you most at this meeting? \_\_\_\_\_

***PLEASE MAIL BACK TO US PRIOR TO MEETING***

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