



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

Presper Financial Architects
441 Wolf Ledges Pkwy, Ste 103 • Akron OH 44311-1038
44856 Hossler Dr. NW, Ste A • North Canton OH 44720-5436
Phone: 330.253.6000 • Fax: 330.374.1161 • www.presperfinancial.com