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ITINERIS Financial Advisors

**Navigating Confident Financial Journeys for Professionals in Mid Life Transition**

# CONFIDENTIAL CLIENT INTAKE QUESTIONNAIRE

1. What are your financial goals and what do you most want for your life?

 ______________________________________________
 ______________________________________________
 ______________________________________________
 ______________________________________________

2. Who are the most important family members or people in your life and what do you want for them?

 ______________________________________________
 ______________________________________________
 ______________________________________________
 ______________________________________________

3. Are there any important changes or events that are currently happening in your life or that could take place in the future? Please describe:

 ______________________________________________
 ______________________________________________
 ______________________________________________
 ______________________________________________

4. What, if anything, could make you no longer worry about money or significantly reduce your anxiety about it?

 ______________________________________________
 ______________________________________________
 ______________________________________________
 ______________________________________________

Please see next page

5. What is your attitude regarding investment risk, safety of capital, and inflation?

   ______________________________________________________________________
   ______________________________________________________________________
   ______________________________________________________________________
   ______________________________________________________________________

6. Please provide the following information:

   - Client Name(s): ______________________________________________
   - Client Age(s): _______________________________________________
   - Children – Age(s): ____________________________________________
   - Parent's – Age(s): ____________________________________________
   - Retirement Goal – Age(s): ______________________________________
   - Other Goals: _________________________________________________

Itineris Financial Advisors is committed to providing suitable financial and investment recommendations. For this reason, we require the information requested on this intake form. Itineris Financial Advisors or LPL Financial shall not disclose this information to any other person, firm or entity without first obtaining your written consent, unless such disclosure is required by law.