



# Greater Gifts

## Family Office

# Confidential Financial Planning Questionnaire

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Name

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Date

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## Disclosure

This material is not intended as an offer or solicitation for the purchase or sale of any security or financial instrument. It is intended to gather important information designed to better assist with your financial planning process. It is distributed with the understanding that it is not intended to render accounting, legal or tax advice. Please consult your legal or tax advisor concerning such matters, as needed, to answer the following questionnaire.

Investment and insurance products are not insured by the FDIC or other governmental agencies and are subject to investment risk, including possible loss of the principal amount invested.

## Client Acknowledgement

To the best of my knowledge, the information provided in this questionnaire is true and correct and reflects an accurate portrayal of my current financial situation. Should any material changes occur prior to the preparation of my financial plan, I will advise Macke Financial Advisory Group, Inc. dba Greater Gifts Family Office immediately.

I further acknowledge that the results of my financial plan will be based on the information I provide, which may include both general and specific recommendations. As my circumstances change, some of the recommendations made within this plan may no longer be appropriate and I should review my situation periodically.

I assume sole responsibility to decide whether to implement the advice contained in the financial plan and to determine whether the recommendations have been implemented correctly.

I understand that the financial plan will include financial projections and make certain assumptions based on historical data that serve as a useful and reasonable basis to develop recommendations. I further acknowledge that there is no guarantee that my experience will match the projections prepared for me.

I agree and acknowledge that the payment of all taxes due on income or capital gains from the implementation of the recommendations remains my sole obligation.

I agree that I am digitally signing this form by typing my name.

Client Signature

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Date

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Co Client Signature

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Date

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# Personal Information

**Marital Status:** (check one)

Single     Married

**Date Married:** \_\_\_\_\_

**Client**

**Co-Client**

First Name, Middle Initial

\_\_\_\_\_

Last Name

\_\_\_\_\_

Birth Date

\_\_\_\_\_

Social Security Number

\_\_\_\_\_

**Primary Address:**

Address

\_\_\_\_\_

City, State Zip

\_\_\_\_\_

**Client**

**Co-Client**

Home Phone

\_\_\_\_\_

Cell Phone

\_\_\_\_\_

Other Phone

\_\_\_\_\_

Email Address

\_\_\_\_\_

Web Page

\_\_\_\_\_

**Other Address:**

Address

\_\_\_\_\_

City, State Zip

\_\_\_\_\_

**Drivers License:**

**License Number**

**Expiration Date**

**State of Issue**

Client

\_\_\_\_\_

Co-Client

\_\_\_\_\_

**Employment:**

Client

Co-Client

Employer

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Occupation

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Work Address

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City, State Zip

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Phone

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Fax

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Email Address

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**Do you or your spouse have any major health problems. If yes, briefly describe:**

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**In one year from now, looking back on your relationship with your financial advisor, what will you expect to have accomplished?**

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**Is there a family history of health issues such as Alzheimer's, Parkinson's, etc?**

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# Dependent Information

**Dependent Children:**

<u>Dependent</u>	<u>Social Security Number</u>	<u>Birth Date</u>	<u>Dependent until age</u>

**Education:**

Percent of college costs parents plan to pay \_\_\_\_\_ %

Check to deduct educational expenses from retirement funds

<u>Child's Name</u>	<u>1st Year of College</u>	<u># of Years</u>	<u>School Type</u>	<u>Funds Available Now</u>	<u>Annual College Costs</u>	<u>Monthly Savings</u>

**Instructions:**

- 1st Year of College** Enter the calendar year the child will begin college.
- # of Years** Enter the number of years the child will be attending college.
- School Type** Select the type of school from the drop down list.
- Funds Available Now** Enter the present value of the funds available for college.
- Annual College Cost** Enter the amount of the annual college costs in today's dollars.
- Monthly Savings** Enter the monthly savings amount to be entered into the college fund.

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