



LET'S GET STARTED!

Part II: QUALITATIVE INFORMATION

Client and Co-Client, if applicable, each complete one separately.

Name _____ Date: ____ / ____ / ____

What are your hobbies and interests? How do you spend your free time? _____

Would you describe yourself as a competitive person? Yes ____ No ____

Do (did) you participate in sports or other competitive activities? If so, which one(s)?

What organizations or groups do you belong to or volunteer for? To what extent do you participate? _____

Where did you go to college? What was your major? _____

Did you attend graduate school? If so, where and what field of study? _____

How is your financial status and behavior the same or different than your parents?

Briefly describe what lessons you learned about money when you were growing up?

How has your financial philosophy or outlook or behavior changed over the years?

Independent, Fee-Only Personal Wealth Management

7454 Jager Court • Cincinnati, OH 45230-4344 • 513-474-9191 • www.bernofinmgt.com



Let's Get Started! Part II: Qualitative Information (Page 2)

On a scale of 1 to 5 (with 1 being low and 5 being high):

Rate how important it is for you to have:

- _____ Nice house
- _____ New car
- _____ Nice clothes
- _____ Nice vacation
- _____ Eat out regularly
- _____ A club membership
- _____ Provide for education or extracurricular activities for children/grandchildren

Rate the degree of harmony about finances in your close personal relationships with:

- _____ Your spouse
- _____ Your children

- _____ Rate how easily your spouse or a close family member would be able to manage your financial affairs if you got hit by a truck tomorrow

- _____ Rate how your children would be able and willing to step in and help if either of you or your spouse became incapacitated?

- _____ Rate how important your religious beliefs are in your decision-making

- _____ Rate your technology skills and internet and electronic device usage

If you have a college education, did you pay for it or your parents or some combination? What would you like to do for your children or grandchildren? _____

What is the most discretionary part of your expenses that could be cut if necessary?
By how much could you cut your expenses, if necessary, per month or per year? _____



Let's Get Started! Part II: Qualitative Information (Page3)

If you won \$50,000 in a raffle today, what would you do with it? (allocate by percentages)

- _____ % Pay off debts
- _____ % Spend it on a special project or purchase,
- _____ % Invest
- _____ % Save
- _____ % Give away to family or friends
- _____ % Give away to charity

If you had all the money in the world, how would you live your life differently today?

If you knew you were going to die in one year, what would you want to accomplish?

How do you want to be remembered by your family? By others? _____

What financial issues worry you the most? _____

What are some of the best and worst financial decisions you have ever made? What do you credit for the best ones? How did you cope with the worst ones? _____

What changes do you foresee in your life in the near future? Next 12 to 24 months? 3 to 5 yrs?

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