BDS Financial Network
New Client Intake Information:

<u>Note:</u> This form is meant as a supplement to the "1. Information for Annual Portfolio Review – outgoing" form. Please fill out both forms, so that we may complete a more accurate review of your financial portfolio.

<u>Client Contact Information:</u>

Client Name: ______________________________

Nickname (goes by): ______________________________

Date of Birth: ______________________________

Address: ______________________________

Phone(s): ______________________________

Email(s): ______________________________

<u>Other Information:</u> (Provide this if you'd like. It helps us get to know you.)

Occupation/Employer: ______________________________

Marital Status/Anniversary: ______________________________

Spouse/Partner Name: ______________________________

<u>Children:</u> (Provide this if you'd like. It helps us get to know you.)

Name: ______________________ DOB: ______________

Name: ______________________ DOB: ______________

Name: ______________________ DOB: ______________

Name: ______________________ DOB: ______________

<u>Questionnare:</u>

Do you have any investment experience? If so, what was your best and worst investment to date and why does this stand out?

What do you hope investing will help you accomplish (i.e. financial goals such as your retirement target age and income, education of kids, vacation home, etc.)

Have you held investments somewhere else previously? If so, what did and didn't you like?

What do you need to live the lifestyle you want? (This is essentially asking what it is you really want to accomplish, beyond the basics of food and shelter. Only you can answer that.)

What is your vision of a happy, healthy retirement? When you have a financial purpose, you can gain motivation, and hopefully, your outlook will be healthier.

Thank you,

Paul E. Miller, Jr., CFP®
Wealth Advisor

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