



SPARROW

WEALTH MANAGEMENT

INVESTED IN RELATIONSHIPS

Phone/Fax: 877.330.9191

www.sparrowwealth.com

SHORT CONFIDENTIAL QUESTIONNAIRE

Name: _____

Marital status: Never Married Divorced Widowed Married/Remarried Date: _____

Address: _____ City, State & Zip: _____

Home Phone: _____ Cell Phone: _____ E-mail Address: _____

DOB: _____ SS# (optional): _____ Gross Income: _____

Employer: _____ Occupation: _____

Expected Retirement Age: _____

Children's Names & Ages: _____

Spouse's Information:

Name: _____ Cell Phone: _____ E-mail Address: _____

DOB: _____ SS# (optional): _____ Gross Income: _____

Employer: _____ Occupation: _____

Expected Retirement Age: _____

Asset Values: Total of Cash/Savings: _____ Total of Taxable Investments: _____

Total of IRAs & SEP IRAs: _____ Total of 401k & 403b Plans: _____

Total of All Other Retirement Plans: _____ Primary Home: _____

Other Real Estate: _____ Business Value: _____ Personal Assets: _____

Face Value of Life Insurance: _____ On who? _____

Debt Values: Mortgage on Primary Home: _____ All Other Debt: _____

Total Annual Living Expenses (including taxes): _____

Estate Planning Completed: Will(s) Durable Powers of Attorney Health Care Directives Trust

NOTES:

Please answer all items the best that you can. All information will be kept confidential. Please read our Privacy Policy.