Name: ____

Your Tax & Financial Check-up is scheduled with __________________________
on __________________, _______________, at _____________.
(day of week) (date) (time)

Please bring the following items with you to the appointment:

- Recent pay stubs
- Recent copy of your 401(k) or other company retirement statements
- Recent copy of your IRA statements
- Copies of recent brokerage, mutual fund and annuity statements
- Copy of most recent tax return, if not prepared by Mennenga Tax
- Recent Social Security Statement
- Recent Pension Statement

Please answer these questions prior to your appointment.

1. What are your primary financial goals?

A.____

B.____

____

____

2. What issues can we work on together?

A.____

B.____

____

Financial Goals Questionnaire

Name ______________________________ Business Phone (s) ______________

Spouse Name ______________________________ Home Phone ______________

In order for our firm to better serve you as your financial professional, it is important that we have a clear understanding of your most important financial goals. Please take a few moments to complete the following questionnaire.

Yes	No	**I am (We are) interested in:**
☐	☐	Preparing an adequate college fund for our children or grandchildren.
☐	☐	Minimizing the taxes we pay on our income and investments.
☐	☐	Retiring comfortably at age _____.
☐	☐	Saving for a major purchase______________________.(e.g. home, auto or vacation)
☐	☐	Making certain our family is financially secure in case of the untimely death of the key financial provider(s).
☐	☐	Making certain our family is financially secure in case of the untimely disability of the key financial provider(s).
☐	☐	Maximizing the inheritance our family will receive by minimizing state and federal estate taxes.
☐	☐	Building a contingency fund to cover financial emergencies.
☐	☐	Other ____.

We are currently using the following investment instruments to achieve our financial goals: (please check all that apply)

☐ Bank Savings Account	☐ Certificate of Deposit	☐ US Savings Bonds
☐ Life Insurance	☐ Disability Insurance	☐ Variable Annuity
☐ Individual Bonds	☐ Individual Stocks	☐ Money Market Fund
☐ Bond Mutual Fund	☐ Equity Mutual Fund	☐ Managed Account
☐ Company 401K Plan	☐ Company Pension Plan	☐ Other__________________

Completing this questionnaire places you under no obligation to use our financial services, and the information obtained here will remain in strictest confidence.

☐ I would like to have someone contact me for an appointment to discuss my financial goals.

☐ I will call to set up an appointment.