FLORIDA WEALTH ADVISORS

Florida Wealth Advisors, LLC.

A Florida Limited Liability Company

Phone: 352-332-0749

Preliminary Fact Finder

Date:

Client Name		DOB		US Citizen Y N	
Spouse Name		DOB		US Citizen Y N	
Address			City, State, Zip		
Home Phone	Fax		email		
Client Cell Phone			Spouse cell phone		
Client SSA #	DL#		State	Issue/expire date	

Family Data:

Children	DOB	Marital status	US Citizen?	Spouse	DOB	Marital status	US Citizen?
		S M Sep Div	Y N			S M Sep Div	Y N
		S M Sep Div	Y N			S M Sep Div	Y N
		S M Sep Div	Y N			S M Sep Div	Y N
Grandchildren				Grandchildren			
		S M Sep Div	Y N			S M Sep Div	Y N
		S M Sep Div	Y N			S M Sep Div	Y N

Property:

Real Estate/Personal	Current value	Tax basis	Pre-retire gross growth rate	Post-retire gross growth rate	Owner

Investments:

Type/Institution name	Current value	Tax basis	Pre-retire gross growth rate	Post-retire gross growth rate	Owner

Retirement:

Type / Institution name	Current Value	Pre-retire gross growth rate	Post-retire gross growth rate	Owner	Beneficiary	Employee contribution	Employer contribution

Business Assets:

Business name	Base value	Tax basis	Pre-retire gross growth rate	Post-retire gross growth rate	Owner	Business type

Insurance and annuities:

	Life 1	Life 2	Long term care	Disability	Annuity	Other
Policy number						
Insurance company						
Purchase date						
Policy type						
Person insured						
Owner						
Beneficiary						
Death benefit						
Cash value now						
Cash value growth rate						
Annual premium						
Premium term						
Premium payer						
Elimination period						
Benefit period						

Does your insurance coverage still fill the need you identified earlier?
Have you worked closely with a life insurance agent or financial planner in the past?

Liabilities:

Mortgage/loans	Institution name	Current balance	As of date	Interest rate	Loan term

Salary/Bonus and Social Security:

	Annual amount	Indexed at	Owner	Destination account	Guaranteed	Starts	Ends
Salary/bonus							
Salary/bonus							
Soc. Sec. #1							
Soc. Sec. #2							

Estimated Living Expenses:

Current	Semi-retirement	Retirement	Advance years	Desired income in the event of death of	
				Client:	
				Spouse:	

Current Estate Planning:

	Simple will	RLT	Funded	Gifts	ILIT	FLP	CLT	CRT	Business Succession	Other
Client										
Spouse										

Attorney / CPA Questions:

Do you have an Estate Planning Attorney?	Y	N
Would you like us to recommend someone?	Y	N
Is your CPA a key decision maker for you?	Y	N
Is your Attorney a key decision maker for you?	Y	N

Personal Questions:

Do you feel you have achieved sufficient financial independence for retirement?
Do you have any potential inheritances?
How would you like to pass your estate to the next generation?
Do you plan to leave any portion of your estate to charity?
Do you need to make any special financial provisions for any member of your family?
Has "estate planning" ever been fully explained to you?
Have you thought about Long Term Care for yourself or a family member?
Do you have concerns about outliving your money?

What in your mind is the largest obstacle to achieving your goals?
Are you willing to invest effort or money if the effort serves to reduce or eliminate taxes?
Are you comfortable managing your own money or do you need help from time to time?
If you own your own business, what steps, if any, have you taken to allow you to retire?
How do you think of yourself financially? Conservative?_______ Moderate?_______ Aggressive?_______

Additional Information:

____

____

____

____

____

____

____

____

Thank you for completing this questionnaire as best you can. It will help us evaluate your circumstances and come up with as many realistic choices for you as possible. If you choose to let us help you with your financial affairs, our commitment is to do whatever is in your best interest.

352-332-0749

Email: tonykendzior@gmail.com