WHITSELL
Financial Partners

Tell Us About You...

Name(s) ____

Address ____

City, State, Zip ____

Preferred E-Mail ____

1. What are your financial Goals (check all that apply):

☐ Prepare for Retirement
☐ Pay less in taxes
☐ Pay off debts
☐ Buy a house
☐ Build an education fund for family
☐ Establish an income stream
☐ Build a long-term investment strategy
☐ Preserve capital
☐ Take care of parents
☐ Provide nursing home expenses
☐ Protect income if I am disabled
☐ Plan for an expected inheritance
☐ Leave heirs as much money as possible
☐ Leave money to charity
☐ Provide income to survivors
☐ Other: ____________________________
____

2. In which of the following age groups do you belong?

☐ 18-29 ☐ 30-39 ☐ 40-49 ☐ 50-59 ☐ 60-69 ☐ 70-79 ☐ 80+

3. Do you have minor children? ☐ Yes ☐ No

4. Do you have minor grandchildren? ☐ Yes ☐ No

5. Are you currently married? ☐ Yes ☐ No

If Yes, spouses name: ________________________

6. Are you currently retired? ☐ Yes ☐ No

If Yes, when did you retire? __________________________

7. What is your occupation? ____

8. Who is your employer? ____

9. Periodically, we offer informative, free seminars and webinars. you?

Would you prefer ☐ Seminars ☐ Webinars

What topics would interest (check all that apply)
☐ Basic Investing ☐ Estate Planning** ☐ Planning for Retirement

☐ Tax-Free Investments* ☐ Timely Market Updates ☐ Paying for education costs

☐ Managing Retirement Income

10. How did you first learn about Whitsell Financial Partners?
☐ I received information in the mail ☐ I saw an ad/article in a newspaper/magazine

☐ Social Media: _________________ ☐ I heard an ad on the radio/TV

☐ Saw Justin speak (which event: ____)

☐ A relative/friend ____

☐ Other: ____

11. What financial-services companies are you currently working with?

____

12. What steps would you be interested in taking next? (please check all that apply):
☐ Schedule an appointment to discuss my financial goals
☐ Receive an invitation to future events and investment workshops
☐ Learn more about the investments and services offered
☐ Receive more information about the history and philosophy of Whitsell Financial Partners
☐ Receive a regular newsletter via email
☐ Other: ____

13. Ideally, how often do you prefer to be contacted?
☐ Monthly ☐ Semi-annually ☐ Quarterly ☐ Annually ☐ Other: ______________________

14. What is the best time to reach you?
☐ Morning ☐ Afternoon ☐ Evening ☐ On (day of the week) ____________________

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*Investments may be subject to state, local, or the Alternative Minimum Tax.
**LPL, Western Wealth Management, Whitsell Financial Partners and its employees and financial advisors are not estate planners and cannot provide tax or legal advice. You should consult with a competent tax specialist or attorney for professional advice on your specific situation.