



Pacific Crest Financial Advisors, LLC

Client Name _____

Life Changes Questionnaire

Currently Anticipate Anticipate
Experiencing short-term long-term

Work

1	Change in career path	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
2	New job	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3	Promotion	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4	Job loss	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
5	Job Restructure	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
6	Education or retraining	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
7	Sell, close or transfer business	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
8	Change of business partner	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
9	Simplify work life/downshift	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
10	Sabbatical or leave of absence	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
11	Initiate or purchase a business	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
12	Retire/semi-retirement	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Financial

1	Sell or purchase a home	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
2	Relocate	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3	Purchase vacation home/timeshare	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4	Re-evaluate investment philosophy	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
5	Experience investment gain	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
6	Experience investment loss	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
7	Debt Concerns	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
8	Consider investment opportunity	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
9	Receive inheritance or financial payout	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
10	Sell assets	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

		Currently Experiencing	Anticipate short-term	Anticipate long-term
<u>Family</u>				
1	Change in marital status (marriage/divorce)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
2	Change in marital status (widowhood)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3	Expecting/adopting child	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4	Hire child care	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
5	Children entering adolescence	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
6	Child with special needs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
7	Child scholastic expenses prior to college	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
8	Child going to college	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
9	Child getting married	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
10	Empty nest	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
11	Family special event	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
12	Educational gifting	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
13	Concern about aging parent	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
14	Concern about health or spouse or child	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
15	Family member needs caregiving	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
16	Concern about personal health	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
17	Provide for long-term care	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
18	Disability / hospitalization	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
19	Death of family member	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<u>Legacy</u>				
1	Increase charitable giving	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
2	Gifting to children/grandchildren	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3	Need to give parental financial support	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4	Develop an estate plan	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
5	Develop an end of life plan	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
6	Other	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>