Poland & Sullivan
Investment & Wealth Strategies

106 HAINES ST
NEWARK, DE 19711

Client Questionnaire

General Information:

	Client 1 (Primary Client)	Client 2 (Spouse/Partner)
First Name		
Last Name		
Birthday		
Retired?	Yes/No	Yes/No
If Not Retired, Age When You Plan to Retire		
Gross Income From Salary + Bonus ($)		
Annual Raise (%)		
Ending Age		

Annual Recurring Expenses (Expenses that will recur each year such as utility bills, groceries, property taxes, etc.):

	Amount (Today's $)
Projected Annual Recurring Expenses in Retirement	

Goals & Non-Recurring Expenses (Not Included in Annual Recurring Expenses above):

Description	Amount (Today's $)	Age of Client 1 When Expense Starts	Duration of Expense (Years)
College for Children			
Wedding			
Car			
Second Home			
Vacations			
Gift or Donation			
Medical Expenses			
Long-Term Care Insurance			
Life Insurance			

Other Insurance	
Mortgage Payments	
Loan Payments	
Other-	
Other-	
Other-	
Other-	

Social Security:

	Client 1 (Primary Client)	Client 2 (Spouse/Partner)
Estimated Annual Payment ($)		
Already Receiving Payments?	Yes/No	Yes/No
If No Above, Age When You Will Begin Receiving Payments		

Client 1 Pensions:

	Pension 1	Pension 2	Pension 3	Pension 4
Annual Payment ($)				
Already Receiving Payments?	Yes/No	Yes/No	Yes/No	Yes/No
If No Above, Age When You Will Begin Receiving Payments				
Annual Growth Rate Of Pension (%)				
% Of Payment That Passes To Spouse/Partner				

Client 2 Pensions:

	Pension 1	Pension 2	Pension 3	Pension 4
Annual Payment ($)				
Already Receiving Payments?	Yes/No	Yes/No	Yes/No	Yes/No
If No Above, Age When You Will Begin Receiving Payments				
Annual Growth Rate Of Pension (%)				
% Of Payment That Passes To Spouse/Partner				

Assets:

Name/Description	Current Value ($)
Home	
Business	
Property	
Second Home	
Personal Asset	
Future Asset- Inheritance	
Future Asset- Gift	
Lump Sum Pension	
Cash Value Life Insurance	
Other Insurance	
Other-	
Other-	
Other-	
Other-	
Other-	
Other-	

Liabilities:

Name/Description	Current Balance ($)
Mortgage	
Second Mortgage	
Equity Line	
Business Loan	
Auto Loan	
Personal Loan	
School Debt	
Taxes Owed	
Other-	
Other-	
Other-	