

Financial Questionnaire

This comprehensive financial questionnaire is designed to help you take inventory of your personal assets and liabilities so that we can create a financial investment plan based on your unique needs. Be assured that this information will be kept **strictly confidential**.

Please complete and return to our office at the address or fax number below.



943 Post Road E • Westport, CT 06880 • www.catmg.com •
Tel: 203.226.0603 • Fax: 203.226.0200 • Email: info@catmg.com

Securities offered through Fidelity Inc. Investment advice offered through Catamount Wealth Management Group LLC a Registered Investment Advisor and separate entity from Fidelity Inc.

Client Name: _____
Date of Birth: _____
Social Security Number: _____
Email Address: _____
Home Phone: _____
Cell Phone: _____
Home Fax: _____
Address: _____

Client Name: _____
Date of Birth: _____
Social Security Number: _____
Email Address: _____
Home Phone: _____
Cell Phone: _____
Home Fax: _____
Address: _____

Employer: _____
Address: _____
Phone: _____
Fax: _____
Anticipated Retirement Date: _____

Employer: _____
Address: _____
Phone: _____
Fax: _____
Anticipated Retirement Date: _____

CHILDREN

Name: _____ DOB: _____ Social Security Number: _____
Name: _____ DOB: _____ Social Security Number: _____
Name: _____ DOB: _____ Social Security Number: _____

INVESTMENTS (401k, 403b, IRAs, Brokerage Accounts)

Type	Owner	Value

CASH (Checking, Savings, Money Markets, CDs)

Type	Owner	Value

REAL ESTATE

Type	Owner	Value

OTHER (Annuities, Life Insurance, Inheritance)

Type	Owner	Value

Debt (Mortgage, Credit Cards, Student Loans, Line of Credit, Other)

Type	Owner	Value



Other Information

Estate Planning Attorney

Name: _____

Address: _____

Firm: _____

Phone: _____

CPA

Name: _____

Address: _____

Firm: _____

Phone: _____

Insurance

Name: _____

Firm: _____

Address: _____

Phone: _____

Other Financial Professionals

Name: _____

Firm: _____

Address: _____

Phone: _____

Communication Preference

Personal Interests or Hobbies



Notes