ART OF WEALTH
MANAGEMENT

Getting to Know You

CLIENT 1

Client Info

☐ Primary Contact

Full Name

Date of Birth

Contact Number

Email Address

Preferred Method of Contact

Work

What is your occupation or are you retired?

If retired, what did you do prior to retirement?

CLIENT 2

Client Info

☐ Primary Contact

Full Name

Date of Birth

Contact Number

Email Address

Preferred Method of Contact

Work

What is your occupation or are you retired?

If retired, what did you do prior to retirement?

Family

Do you have dependents? If so, what are their names and ages?

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Planning

What prompted you to connect with Art of Wealth Management?

Were you referred to Art of Wealth Management? ☐ Yes ☐ No If yes, by who?

What specific topics would you like to learn more about or discuss in greater detail with Art of Wealth Management?

Have you worked with a financial advisor before? ☐ Yes ☐ No

If yes, what was your experience like?

Is there any information you think would be beneficial to share prior to our next meeting?

Once complete, please email to info@artofwealthmgmt.com prior to your meeting.

List of Items to Bring to Our Next Meeting:

- Prior year tax returns
- Most recent investment account statements including 401(k)s, IRAs, Trust, 529 accounts, etc.
- Current debt information including mortgages, lines of credit, personal loans, auto loans
- Insurance information (life insurance, disability insurance, or long-term care)
- Trust Documents & Corporate Documents

ART OF WEALTH MANAGEMENT

CARSON PARTNERS

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