Basic Planning Information

Enduring WEALTH ADVISORS®

Information provided is held in the strictest confidence. Please provide as much information as possible at this time. Check the "N/A" box if the item is "Not Applicable". Please bring copies of all investment, pension & retirement plan statements and your tax return to the initial meeting. Please return this form via email (or fax to 951-693-9907.)

Securities and advisory services offered through LPL Financial, a registered investment advisor. Member FINRA/SIPC

Description	N/A	Client	N/A	Spouse
Full Name				
Nickname	☐		☐	
Date of Birth				
Employment Information				
Gross income (before taxes)	☐		☐	
Net Income (take home pay)	☐		☐	
Paid how often?				
Employer Name	☐		☐	
Occupation				
Employment Date	☐		☐	
Address	☐		☐	
City	☐		☐	
Zip Code	☐		☐	
Business Phone	☐		☐	
Business Email	☐		☐	
Fax	☐		☐	
Personal Information				
Address				
City				
Zip Code				
Mobile Phone				
Home Phone	☐		☐	
Personal Email	☐		☐	
Wedding Anniversary Date				
Estate Planning & Risk Management				
Name of Family Trust	☐			
Date of Trust / Will(s)	☐		☐	
Life Insurance (Employer)	☐		☐	
Life Insurance (Personal)	☐		☐	
Long Term Care (LTCi) Amount	☐		☐	
Disability Insurance Amount	☐		☐	

Investment & Planning Concerns

Please rank the following items from most important (1) to least important (9).

Client 1	2	3	4	5	6	7	8	9		Spouse 1	2	3	4	5	6	7	8	9
○	○	○	○	○	○	○	○	○	Fear of Loss	○	○	○	○	○	○	○	○	○
○	○	○	○	○	○	○	○	○	Rate of Return	○	○	○	○	○	○	○	○	○
○	○	○	○	○	○	○	○	○	Inflation	○	○	○	○	○	○	○	○	○
○	○	○	○	○	○	○	○	○	Taxes	○	○	○	○	○	○	○	○	○
○	○	○	○	○	○	○	○	○	Leave an Inheritance	○	○	○	○	○	○	○	○	○
○	○	○	○	○	○	○	○	○	Living Comfortably	○	○	○	○	○	○	○	○	○
○	○	○	○	○	○	○	○	○	Liquidity (access to funds)	○	○	○	○	○	○	○	○	○
○	○	○	○	○	○	○	○	○	Simplify Account Management	○	○	○	○	○	○	○	○	○
○	○	○	○	○	○	○	○	○	Advanced Planning Strategies	○	○	○	○	○	○	○	○	○

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