Please complete and send to:
Walden Wealth Partners LLC
6240 SOM Center Rd, Suite 220
Solon, OH 44139
hello@waldenwealth.com
440.248.1632 (fax)

Personal Financial Snapshot

Today's date ______________________________

I. General Information

	Client	Co-client (if applicable)
Date of birth	______________________	______________________
Phone: Cell	______________________	______________________
Home	______________________	______________________
Work	______________________	______________________
Email:	______________________	______________________
Occupation:	______________________	______________________
Home Address:	______________________	______________________

Please check: ☐ Single ☐ Married ☐ Divorced ☐ Widowed

Please list any dependents and birthdates:

Child/Dependent Name	Date of Birth
______________________	______________________
______________________	______________________
______________________	______________________
______________________	______________________

II. Financial Planning Goals and Concerns

Please share your most important personal financial goals and concerns.

1.

2.

3.

III. Your Advisory Team

CPA	
Attorney	
Insurance Agent	
Investment Counsel	

IV. Asset & Liability Information

Please estimate current values for the following or attach recent account statements.

	Assets	Annual Savings
Bank Accounts/Money Markets	$	$
Taxable Investments	$	$
Retirement Investments	$	$
Real Estate	$	
Business Interests	$	
Other Assets	$	

	Liabilities	Interest Rate
Home Mortgage(s)	$	%
Other Debt	$	%

IV. Annual Earned Income

	Client	Co-Client
Salary:	$	$
Other:	$	$

V. Expenses

Estimate of monthly or annual living expenses $

VI. Insurance

	Client		Co-Client	
Life Insurance	Yes	No	Yes	No
Disability	Yes	No	Yes	No
Long Term Care	Yes	No	Yes	No

VI. Retirement Income Source

	Client		Co-Client	
Social Security	Yes	No	Yes	No
Pension	Yes	No	Yes	No
Other:	Yes	No	Yes	No

VI. Estate Plan

	Client		Co-Client	
Will	Yes	No	Yes	No
Trust(s)	Yes	No	Yes	No
Durable Power of Attorney	Yes	No	Yes	No
Healthcare Power of Attorney	Yes	No	Yes	No

How did you hear about Walden Wealth?
(We're glad you did, and look forward to getting acquainted.)

Thank you for completing the Snapshot and sending it to us before our initial conversation. This information will help us to determine how we can best serve your financial planning goals and needs. All information you provide is strictly confidential.