



## PERSONAL INFORMATION

Client 1 Name:

Mr. Mrs. Ms. Miss Dr.

Client 2 Name:

Mr. Mrs. Ms. Miss Dr.

Address:

Client 1:

Cell Phone:

Work Phone:

Home Phone:

Email:

Date of Birth:

Occupation:

For couples, how would you prefer to be addressed?

Example:

Mr. and Mrs. John Smith

Mr. and Mrs. John and Jane Smith

J Jane and John Smith

Ms. Jane Johnson & Mr. John Smith

O Other:

Client 2:

Cell Phone:

Work Phone:

Home Phone:

Email:

Date of Birth:

Occupation:

Wedding Anniversary:

Citizenship: US Other:

Mark envelopes confidential: Yes No

How would you prefer to be contacted: Email Mail

Children's names and Dates of Birth:

By whom were you referred?

A friend, relative, or personal associate:

Another advisor:

A Professional Organization: NAPFA, FPA, Fee-Only

The CCMI Website

Other:

Please list any additional financial concerns or questions you would like to discuss:



## Fee-Only Wealth Management Services

### Portfolio Management

#### Research & Management

Asset Allocation

Ongoing Position Monitoring

Trading and Rebalancing

Performance Reports

#### Investment Planning

Annual Investment Policy Review

Account Selection & Consolidation

Planning For Concentrated Stock

Company RSU/Option Planning

#### Client Services

Forms Preparation

Transfer of Assets

Required Minimum Distributions

Notary Services

#### Tax Planning

Withdrawal Strategies In Retirement

Review of Cost Basis

Tax Loss Harvesting

Evaluate Roth Conversions

Assist with Charitable Giving

### Financial Planning

#### Business Owners

Planning for Liquidity Events

Succession Planning

Family Meeting Facilitation

Business Counseling

Business Continuation

#### Cash Flow Planning

Retirement Planning

Tax Planning

Educational Funding

Debt Management

Large One-Time Purchase

#### Estate Planning

Plan Design

Estate Tax Scenarios

Charitable Giving Strategies

Facilitate Family Meetings

#### Asset Protection

Life & Disability Insurance Needs

Property/Casualty Insurance Review

Long-Term Care

Health Insurance Review

***Because money doesn't come with instructions. <sup>SM</sup>***

**www.myccmi.com • (800) 615-6666**

**Fee-Only Advisors**