



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:

Blank lines for 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:

Blank lines for additional financial concerns or questions.

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. SM

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Fee-Only Advisors