



TMB Financial Solutions

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<http://www.milfordbank.com>



Client Factfinder





Personal Information

Date:

Mr.
 Mrs.
 Ms.

First Name	M. I.	Last Name
Birth Date	Age	Social Security Number
Street Address		
City/Town	State/ZIP	
Home Phone	Home FAX	
Cellular Phone	Email Address	
Employment		
Occupation	Employer	
Employer Address	Phone	
Fax	Email Address	
Education		
School	Degree	Affiliations (clubs, activities, sports)
High School		
College		
Graduate School		
Military Service		
Dates of Active Duty	Branch	Type of Discharge
Notes		



Personal Information

Mr.
 Mrs.
 Ms.

Spouse/Partner		
First Name	M. I.	Last Name
Birth Date	Age	Social Security Number
Cellular Phone	Email Address	
Spouse/Partner's Employment		
Occupation	Employer	
Employer Address	Phone	
Fax	Email Address	
Spouse/Partner's Education		
School	Degree	Affiliations (clubs, activities, sports)
High School		
College		
Graduate School		
Spouse/Partner's Military Service		
Dates of Active Duty	Branch	Type of Discharge
Children/Grandchildren/Other Dependents		
Name	Birth Date	Relationship

Please attach any additional information on a separate sheet.



Personal Information

Contacts

Tax Preparer	
Name	Address
Phone	Email
Attorney	
Name	Address
Phone	Email
Insurance Agent	
Name	Address
Phone	Email
Investment Advisor	
Name	Address
Phone	Email
Notes	



Personal Goals

"Follow your passion, and success will follow you."

~ Arthur Buddhold

Please answer the following questions.

What do you strive for most in life?
What do you try to avoid?
Do you want to continue your education? In what way?
Would you consider changing careers? To what?
What are your hobbies?
Do you do volunteer work?
How do you meet new people?
Do you consider yourself a saver or a spender?



Personal Goals

"The real measure of your wealth is how much you'd be worth if you lost all your money."

~ Author unknown

How do you envision your future lifestyle?

Do you travel or want to travel? Where?

What values or philosophies do you want most to pass on to your children or grandchildren?

What do you want your legacy to be?

If you had complete financial security, how would you spend your time?

Name the most important personal goal you want to meet...

within one year

within five years

within ten years



Financial Concerns

"Money is better than poverty, if only for financial reasons."

~ Woody Allen

Please rate how important the following financial concerns are to you, 5 being the most important, 1 being the least important.

Concern	1	2	3	4	5
Plan a budget	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Start a short-term savings plan (e.g., to buy a house, or take a vacation)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Create or update an education savings plan for my children	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Create or update a retirement savings plan	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Create or update an investment plan	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Create or update an estate plan	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Start a new business	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Review tax efficiencies	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Analyze my insurance needs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Organize my financial documents	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Notes



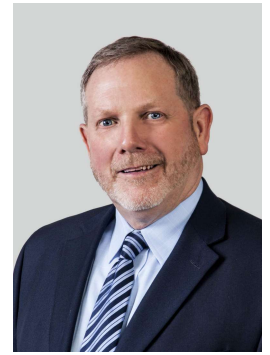
Financial Goals Worksheet

***"Goals are dreams with deadlines."
~ Diana Sharf Hunt***

Please complete this worksheet for your two most important short-term, medium-term, and long-term financial goals.

Goal	By When?	Amount
Short Term (within 3 years)		
Medium Term (3-7 years)		
Long Term (over 7 years)		
Notes		

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