CONDON
WEALTH MANAGEMENT, INC.

Thank you for your interest in meeting with us.
Please take a moment to fill out the form below. The following information will help us begin to understand your financial picture and better assist you.

YOUR NAME: ______________________________

SPOUSE'S NAME: ______________________________

HOME PHONE: ______________________________

CELL / MOBILE: ______________________________

WORK PHONE: ______________________________

FAX NUMBER: ______________________________

EMAIL ADDRESS: ______________________________

SPOUSE'S EMAIL: ______________________________

MAILING ADDRESS: ______________________________

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DATE OF BIRTH YOU: __________ SPOUSE: __________

IF RETIRED ... DATE RETIRED (YOU): ______________________________

DATE RETIRED (SPOUSE): ______________________________

IF WORKING ... OCCUPATION (YOU): ______________________________

TITLE (YOU): ______________________________

PLANNED RETIREMENT DATE (YOU)? __________

OCCUPATION (SPOUSE): ______________________________

TITLE (SPOUSE): ______________________________

PLANNED RETIREMENT DATE (SPOUSE)? __________

WHAT IS THE MAIN REASON FOR YOUR VISIT TODAY?

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DO YOU CURRENTLY HAVE A FINANCIAL ADVISOR (NAME)? ____________________

DO YOU HAVE A CPA/TAX PREPARER (NAME)? ____________________

DO YOU HAVE AN ESTATE ATTORNEY (NAME)? ____________________

DO YOU HAVE AN INSURANCE AGENT (NAME)? ____________________

HOW DID YOU HEAR ABOUT CONDON WEALTH MANAGEMENT?

- ☐ FRIEND
- ☐ FAMILY MEMBER
- ☐ COLLEAGUE
- ☐ OTHER PROFESSIONAL
- ☐ INTERNET/WEB SITE
- ☐ OTHER: ____________________

IF YOU WERE REFERRED TO US, MAY WE ASK BY WHOM SO WE CAN THANK THEM?

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WHAT ELSE SHOULD WE KNOW ABOUT YOU, YOUR GOALS, FAMILY, ETC?

ARE YOU A MEMBER OF ANY CLUBS OR ORGANIZATIONS?

WHAT ARE YOU PERSONAL INTERESTS (SUCH AS GOLF, COOKING, WINE?)

DO YOU HAVE ANY SPECIFIC FINANCIAL QUESTIONS OR CONCERNS FOR US?

Thank you for taking the time to fill us in!