



CONFIDENTIAL INVESTMENT QUESTIONNAIRE

Personal Information

Personal Information		Joint Information
<i>Name</i>		
<i>Birthdate/Age</i>		
<i>Address</i>		
<i>City/State/Zip</i>		
<i>Email/Cell</i>		
<i>Home Telephone</i>		
<i># of Children</i>		
<i>Children's Ages</i>		

Occupation Information

Personal Information		Joint Information
<i>Employer</i>		
<i>Occupation</i>		
<i>Years Employed</i>		
<i>Annual Gross Inc</i>		
<i>Other Income</i>		
<i>/Source</i>		
<i>Ages you would like to retire:</i>		

Financial Information

Personal Information		
<i>Do you have a 401K?</i>	<i>Yes/No</i>	<i>Value:</i>
<i>Do you have IRA's?</i>	<i>Yes/No</i>	<i>Value:</i>
<i>Do you have a Brokerage Account?</i>	<i>Yes/No</i>	<i>Value:</i>
<i>Do you have a Pension?</i>	<i>Yes/No</i>	<i>Value:</i>
<i>Do you have Other accounts?</i>	<i>Yes/No</i>	<i>Value:</i>
<i>Please describe:</i>		

Financial Information (cont..)

Joint Information		
<i>Do you have a 401K?</i>	<i>Yes/No</i>	<i>Value:</i>
<i>Do you have IRA's?</i>	<i>Yes/No</i>	<i>Value:</i>
<i>Do you have a Brokerage Account?</i>	<i>Yes/No</i>	<i>Value:</i>
<i>Do you have a Pension?</i>	<i>Yes/No</i>	<i>Value:</i>
<i>Do you have Other accounts?</i>	<i>Yes/No</i>	<i>Value:</i>
<i>Please describe:</i>		

Property Details

<i>Fair Market Value of Primary Residence</i>	
<i>Total Mortgage Liens on Property</i>	
<i>Type of Loans</i>	<i>Fixed/Adjusted/Other</i>
<i>Term of Loan</i>	<i>30/15/10/Other</i>
<i>Current Interest Rate</i>	
<i>Do you own Investment Property?</i>	<i>Yes/No</i>

Life Insurance

	Personal	Joint
<i>Do you have Life Insurance?</i>	<i>Yes/No</i>	<i>Yes/No</i>
<i>What is the death benefit?</i>		
<i>Is it a Term Policy?</i>	<i>Yes/No</i>	<i>Yes/No</i>

<i>Other than your mortgage, how much other debt do you carry? (i.e., car, credit cards, student loans, etc.)</i>

<i>Have you ever worked with a Financial Advisor? Yes/No</i>
<i>What is your most important financial goal?</i>
<i>In your opinion, what percent of income should you be saving?</i>

Thank you for taking the time to complete the Confidential Investment Questionnaire. All information will be held to the highest degree of confidence. Please note that this is not an agreement or contract for services, but a means of gathering important information to better serve you. We will contact you shortly to schedule a consultation. We can be reached at 727-823-1500 for questions. *Thank you!*

Return to: Coastline Financial Solutions 146 2nd Street N Suite 206 St Petersburg, Florida 33701
Or FAX to 727-823-5194