**Financial Management Questionnaire Form**

**Personal Details
Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
Occupation: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
Contact Number: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
Email Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Income and Savings
Do you have a consistent income source? [ ] Yes [ ] No
Approximate annual income: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
Do you save a portion of your income regularly? [ ] Yes [ ] No**

**Financial Management Practices
Do you maintain a financial plan or budget? [ ] Yes [ ] No
Have you consulted a financial advisor? [ ] Yes [ ] No**

**Investment Preferences
Do you invest in any of the following? (Check all that apply):
[ ] Real Estate
[ ] Stocks
[ ] Bonds
[ ] Mutual Funds**

**Table Section**

| **Investment Type** | **Approximate Value** | **Time Period** | **Return Expectations** |
| --- | --- | --- | --- |
| **Real Estate** |  |  |  |
| **Stocks** |  |  |  |
| **Bonds** |  |  |  |
| **Mutual Funds** |  |  |  |

**Additional Comments
Provide any further details about your financial goals or concerns: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**