**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: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**