Getting to Know You

Name(s): ______________________________ & ____________________________________

Address:____

____

Home Phone: ____

YOU | **SPOUSE**

(occupation)__________________________ (occupation)__________________________

(cell)_______________________________ (cell) ______________________________

(work) _____________________________ (work) _____________________________

(email) _____________________________ (email) ____________________________

Marital Status:

☐ Single ☐ Married ☐ Divorced ☐ Widowed

Age(s):

Person 1: ☐ 25-44 ☐ 45-54 ☐ 55-64 ☐ 65+

Person 2: ☐ 25-44 ☐ 45-54 ☐ 55-64 ☐ 65+

Children: Do you have children? ☐ Yes ☐ No

If so, how many? ____________________ Ages: ________________________________

Household Income:

- ☐ <$100,000
- ☐ $100,000-$200,000
- ☐ $200,000- $300,000
- ☐ $300,000+

Estimated Net Worth:

- ☐ <$500,000
- ☐ $500,000- $ 2million
- ☐ $2 million - $4 million
- ☐ $4 million+

List Your Concerns: (Check all that apply)

- ☐ Tax Planning
- ☐ Retirement Planning
- ☐ Estate Planning
- ☐ Education Planning
- ☐ Insurance Review
- ☐ Investment Analysis
- ☐ Other____________________

Are you currently working with:
(Check all that apply)

- ☐ Investment Advisor
- ☐ Financial Planner
- ☐ CPA/Tax Preparation
- ☐ Attorney
- ☐ Insurance Advisor
- ☐ Other_______________________

How did you hear about us? ____

PLEASE BRING THESE ITEMS TO YOUR FIRST APPOINTMENT:

- Last (2) two years tax returns
- Current investment/retirement statements
- Current will or trusts

Please fax this form to 281.362.7087 prior to your initial meeting.

C.GERACI & CO.
WEALTH & INVESTMENT ADVISORS