



Bortolussi Wealth Management, Inc.

Investor Questionnaire – Confidential

Name: _____ **Date of Birth:** _____
Address: _____ **Married or Single:** _____
Planned Retirement Age: _____
Email Address: _____
Home Phone Number: _____

Personal Assets and Debt

Value of Residence: _____ **Mortgage:** _____
Value of Vehicles: _____ **Loan Amount:** _____
Other Valuables: _____ **Other Debt:** _____
Checking Account Value(s): _____ **Savings Account Value(s):** _____
401(k) Value(s): _____ **IRA Value(s):** _____
Investment Account Value(s): _____ **Annuity Value(s):** _____
Pension Value(s): _____ **Business Value(s):** _____
529 Value(s): _____ **Cash Value:** _____

Income and Expenses

Salary: _____ **Social Security Income:** _____
Life Insurance: _____ **Other Insurance:** _____
Estimated Monthly Living Expense: _____ **Other Income:** _____

Personal Questions

What are you most concerned with regarding your financial position and what do you want to achieve?

Where do you see your financial position in 5 years and in 10 years?

What do you expect from your Investment Advisor?

Additional Comments/Instructions: