

BLK Financial Advisors, LLC
Investment Management and Financial Planning



Registered Investment Advisor

Glendale, Arizona 85308
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BLK Financial Advisors, LLC

Investment Management and Financial Planning

Personal Financial Snapshot

Confidential

Contact Information

Date Completed: _____

Client Name: _____ Phone: _____

Address: _____ E-mail: _____

_____ Fax: _____

How did you hear about us? _____

Please explain if in need of any financial planning or investment management advice?

Where are you right now?

Date of birth: _____ Marital Status: _____

Occupation: _____ Retirement Age: _____

How many children do you financially support: _____

List 2-3 main goals you have for retirement: _____

How are you preparing to reach your goals?

How much is your household income annually? _____

How much have you saved so far? _____ How much saved monthly? _____

Do you have any of these debts? C. Card \$_____ Student Loan \$_____ Car Loan \$_____

Value- primary home? _____ 2nd home? _____ Owed-primary? _____ 2nd? _____

Value- total investible assets? _____ % in existing employer plan? __ other plans? __

How is your savings invested? All cash __ Mostly Bonds & Cash(20% Stock, 50% bonds, 30% cash) __ Half Stocks/HalfBonds __ Mostly Stocks(70%) __ All Stocks __

Do you know your net worth (total assets - total liabilities)? _____

Do you have a will, trust, or other estate planning documents? _____

Do you have insurance coverage? Life \$_____ Health \$_____ Disability \$_____