CampbellFinancialPartners, LLC
FEE-ONLY FINANCIAL PLANNING
17595 S. Tamiami Trail, Suite 220
Fort Myers, Florida 33908
P 239-454-5333 F 877-395-8616

Date: ____/____/____

FINANCIAL PLANNING QUESTIONNAIRE

Any financial plan, advice or recommendations will be based on the information you provide. Incomplete or inaccurate information will negatively impact the results. We realize that we may request more information than other planners but the extra time you invest will help us develop a more complete picture. All information provided is in the strictest confidence.

We look forward to meeting with you to answer your questions about us, help you learn more about the financial planning process, and review your situation. During our meeting, we can explain our services and determine an appropriate fee.

When you have completed the questionnaire, please fax or email it to us at least 2 days prior to your appointment. Delivery information is on page 9. Please also review a copy of our ADV Part 2, Privacy Policy, and Form CRS in the "Forms" area of our website at www.campbellfp.com.

	Client #1			Client #2		
Name						
Home Address						
Home Address						
City, State, Zip						
Home Phone						
Work Phone						
Cell Phone						
Home Fax						
Work Fax						
Email Address						
Date of Birth/Age						
Employer / # years						
Title/Job						
Date of Marriage						
Age You Plan to Retire						

Primary contact person during business hours:

Best way to contact you during business hours: (circle one) Home Phone Work Phone Cell Phone Email

What motivated you to contact Campbell Financial Partners at this time?

Please Note: **Reliance on information provided** - Campbell Financial Partners shall rely upon information provided by you and will not verify the accuracy of the information. Accordingly, in the event that any information provided is inaccurate or incomplete, the corresponding results or recommendations will be inaccurate or incomplete. It remains your responsibility to notify Campbell Financial Partners of any changes in the information provided.

Campbell Financial Partners, LLC
FEE-ONLY FINANCIAL PLANNING
17595 S. Tamiami Trail, Suite 220
Fort Myers, Florida 33908
P 239-454-5333 F 877-395-8616

Children					
Name	Relationship	Date of Birth	Dependent	Resides in City, State	
			Y / N		
			Y / N		
			Y / N		
			Y / N		
			Y / N		
			Y / N		

Income Information (From page 1 of your most recent tax return or from paystubs)		
	Client #1	Client #2
Wages & Salaries	$	$
Interest	$	$
Dividends	$	$
Business Income	$	$
Pensions & Social Security	$	$
Alimony & Other	$	$
Total	$	$

Tax Preparation by: ❐ Self ❐ Other (check one, fill out below if "Other")				
Preparer Name				
Address				
City, State, Zip				
Phone			Fax	

Please Note: **Reliance on information provided** - Campbell Financial Partners shall rely upon information provided by you and will not verify the accuracy of the information. Accordingly, in the event that any information provided is inaccurate or incomplete, the corresponding results or recommendations will be inaccurate or incomplete. It remains your responsibility to notify Campbell Financial Partners of any changes in the information provided.

CampbellFinancialPartners, LLC
FEE-ONLY FINANCIAL PLANNING
17595 S. Tamiami Trail, Suite 220
Fort Myers, Florida 33908
P 239-454-5333 F 877-395-8616

Estate Planning Documents (If you do not have any, enter "N/A")

	Client #1		Client #2	
	Year Drafted	Drafted in State of	Year Drafted	Drafted in State of
Will				
Trust				
Power of Attorney				
Living Will				
Other Documents				

Financial Opinions/Preferences

Of the following statements, indicate your preferences using a scale of 1 – 5: 1 = Most True; 5 = Least True

Client #1 1 2 3 4 5	Client #2 1 2 3 4 5	
❒ ❒ ❒ ❒ ❒	❒ ❒ ❒ ❒ ❒	I would rather work longer than reduce my standard of living in retirement.
❒ ❒ ❒ ❒ ❒	❒ ❒ ❒ ❒ ❒	I feel that I/we can reduce our current living expenses to save more for the future if needed.
❒ ❒ ❒ ❒ ❒	❒ ❒ ❒ ❒ ❒	I am more concerned about protecting my assets than about growth.
❒ ❒ ❒ ❒ ❒	❒ ❒ ❒ ❒ ❒	I prefer the ease of mutual funds over individual securities.
❒ ❒ ❒ ❒ ❒	❒ ❒ ❒ ❒ ❒	I am comfortable with investments that promise slow, long term appreciation and growth.
❒ ❒ ❒ ❒ ❒	❒ ❒ ❒ ❒ ❒	I don't brood over bad investment decisions I've made in the past.
❒ ❒ ❒ ❒ ❒	❒ ❒ ❒ ❒ ❒	I feel comfortable with aggressive growth investments.
❒ ❒ ❒ ❒ ❒	❒ ❒ ❒ ❒ ❒	I don't like surprises.
❒ ❒ ❒ ❒ ❒	❒ ❒ ❒ ❒ ❒	I am optimistic about my financial future.
❒ ❒ ❒ ❒ ❒	❒ ❒ ❒ ❒ ❒	My immediate concern is for income rather than growth opportunities.
❒ ❒ ❒ ❒ ❒	❒ ❒ ❒ ❒ ❒	I am a risk taker.
❒ ❒ ❒ ❒ ❒	❒ ❒ ❒ ❒ ❒	I make investment decisions comfortably and quickly.
❒ ❒ ❒ ❒ ❒	❒ ❒ ❒ ❒ ❒	I like predictability and routine in my daily life.
❒ ❒ ❒ ❒ ❒	❒ ❒ ❒ ❒ ❒	I usually pick the tried and true, the slow, safe but sure investments.
❒ ❒ ❒ ❒ ❒	❒ ❒ ❒ ❒ ❒	I need to focus my investment efforts on building cash reserves.
❒ ❒ ❒ ❒ ❒	❒ ❒ ❒ ❒ ❒	I prefer predictable, steady return on my investments, even if the return is low.

CampbellFinancialPartners, LLC
FEE-ONLY FINANCIAL PLANNING
17595 S. Tamiami Trail, Suite 220
Fort Myers, Florida 33908
P 239-454-5333 F 877-395-8616

Advisor Relationships (where applicable, rate your working relationships with each of the following advisors)

1 = Very Dissatisfied 5 = Very Satisfied (check one)

Advisor	Not Applicable	1 2 3 4 5	Comments
Financial Planner	❒	❒ ❒ ❒ ❒ ❒	
Broker #1	❒	❒ ❒ ❒ ❒ ❒	
Broker #2	❒	❒ ❒ ❒ ❒ ❒	
Accountant	❒	❒ ❒ ❒ ❒ ❒	
Tax Preparer	❒	❒ ❒ ❒ ❒ ❒	
Attorney	❒	❒ ❒ ❒ ❒ ❒	
Insurance Agent – Auto	❒	❒ ❒ ❒ ❒ ❒	
Insurance Agent – Home	❒	❒ ❒ ❒ ❒ ❒	
Insurance Agent – Life	❒	❒ ❒ ❒ ❒ ❒	
Insurance Agent - Other	❒	❒ ❒ ❒ ❒ ❒	

Insurance Coverage

	Client #1			Client #2		
Type Coverage	Brief Description / Company	Group Policy	Indivi-dual	Brief Description / Company	Group Policy	Indivi-dual
Health		❒	❒		❒	❒
Disability #1		❒	❒		❒	❒
Disability #2		❒	❒		❒	❒
Life #1		❒	❒		❒	❒
Life #2		❒	❒		❒	❒
Life #3		❒	❒		❒	❒
Homeowners		❒	❒		❒	❒
Auto #1		❒	❒		❒	❒
Auto #2		❒	❒		❒	❒
Umbrella Liability		❒	❒		❒	❒
Professional Liability		❒	❒		❒	❒
Long Term Care		❒	❒		❒	❒
Ever been turned down for insurance?	❒ No ❒ Yes Why?			❒ No ❒ Yes Why?		

CampbellFinancialPartners, LLC
FEE-ONLY FINANCIAL PLANNING
17595 S. Tamiami Trail, Suite 220
Fort Myers, Florida 33908
P 239-454-5333 F 877-395-8616

Pension Plans

Description	Client #1	Client #2	Begin At Age	COLA	Monthly Benefit
	❒	❒		❒	$
	❒	❒		❒	$
	❒	❒		❒	$
	❒	❒		❒	$

Have you received a copy of your credit report in the past 12 months?	❒ Yes ❒ No

How were your current investment assets selected?

Note: if you have a statement or printout of your assets and/or liabilities, please bring a copy to our meeting.

Assets – Bank Accounts (title on account will be one name only, jointly owned, in your trust, business, etc.)

Institution	Check -ing	Sav- ings	CD	Money Market	Title on account	Balance
	❒	❒	❒	❒		$
	❒	❒	❒	❒		$
	❒	❒	❒	❒		$
	❒	❒	❒	❒		$
	❒	❒	❒	❒		$
	❒	❒	❒	❒		$
	❒	❒	❒	❒		$
	❒	❒	❒	❒		$
	❒	❒	❒	❒		$

Please Note: **Reliance on information provided** - Campbell Financial Partners shall rely upon information provided by you and will not verify the accuracy of the information. Accordingly, in the event that any information provided is inaccurate or incomplete, the corresponding results or recommendations will be inaccurate or incomplete. It remains your responsibility to notify Campbell Financial Partners of any changes in the information provided.

Campbell Financial Partners, LLC
FEE-ONLY FINANCIAL PLANNING
17595 S. Tamiami Trail, Suite 220
Fort Myers, Florida 33908
P 239-454-5333 F 877-395-8616

Assets – Real Estate and Personal Property

Description	Year Bought	Cost	Title on property	Estimated Value
Primary Residence				$
Other Residence or land				$
Furnishings (liquidation value)				$
Vehicle #1:				$
Vehicle #2:				$
Vehicle #3:				$
Other:				$
Other:				$
Other:				$

Assets – Other **(401k, IRA, other retirement accounts, etc. Bring a copy of the most current brokerage, mutual fund, annuity, and retirement account statements to the initial meeting)**

Institution	Description	Title on account	Estimated Value
			$
			$
			$
			$
			$
			$
			$

Liabilities – Credit Cards

Credit Card Company	Card Name	Interest Rate	Avg. Monthly Payment	Current Balance
		%	$	$
		%	$	$
		%	$	$
		%	$	$
		%	$	$

Please Note: **Reliance on information provided** - Campbell Financial Partners shall rely upon information provided by you and will not verify the accuracy of the information. Accordingly, in the event that any information provided is inaccurate or incomplete, the corresponding results or recommendations will be inaccurate or incomplete. It remains your responsibility to notify Campbell Financial Partners of any changes in the information provided.

CampbellFinancialPartners, LLC
FEE-ONLY FINANCIAL PLANNING
17595 S. Tamiami Trail, Suite 220
Fort Myers, Florida 33908
P 239-454-5333 F 877-395-8616

Liabilities – Other Debts (residence, autos, business, school, etc.)				
Description – include start date and original amount	Term of Loan (in years)	Interest Rate	Avg. Monthly Payment	Current Balance
		%	$	$
		%	$	$
		%	$	$
		%	$	$
		%	$	$

Please tell me about any personal, family, and career goals for the near and far term.

Describe how you see your retirement years.

CampbellFinancialPartners, LLC
FEE-ONLY FINANCIAL PLANNING
17595 S. Tamiami Trail, Suite 220
Fort Myers, Florida 33908
P 239-454-5333 F 877-395-8616

Do you anticipate any unusual expenses in the future? If so, list expense and amounts:

Do you anticipate any unusual income in the future such as bonuses, gifts, or inheritance? List amount and date (or approximate date) if known:

What do you currently need from your financial planner or advisor?

A year from now what expectations do you have from your relationship with your financial planner or advisor?

Please Note: **Reliance on information provided** - Campbell Financial Partners shall rely upon information provided by you and will not verify the accuracy of the information. Accordingly, in the event that any information provided is inaccurate or incomplete, the corresponding results or recommendations will be inaccurate or incomplete. It remains your responsibility to notify Campbell Financial Partners of any changes in the information provided.

CampbellFinancialPartners, LLC
FEE-ONLY FINANCIAL PLANNING
17595 S. Tamiami Trail, Suite 220
Fort Myers, Florida 33908
P 239-454-5333 F 877-395-8616

Have you had a previous relationship with a financial planner/advisor and, if so, what did you like and/or dislike about that relationship?

How would you rate or describe your knowledge of money and investing?

Are you satisfied with your investment results?

Are there any investments you will not buy for personal or social reasons? If so, what are they?

Please send a completed copy of this form to us so that we receive it at least 2 business days before the Initial Meeting.	
Email	Email scanned copy to kc@campbellfp.com
Fax	Fax to 1-877-395-8616

The items below, as well as others, may be needed should you engage our services.	
1. Prior year tax return 2. Brokerage, mutual fund, and annuity account statements 3. Trust account statements 4. Retirement plan account statements 5. Loan statements and documents	6. Most recent paycheck stubs 7. Most recent social security statement 8. Employee benefits booklet 9. Estate planning documents 10. Insurance policy declaration pages and statements

Please Note: **Reliance on information provided** - Campbell Financial Partners shall rely upon information provided by you and will not verify the accuracy of the information. Accordingly, in the event that any information provided is inaccurate or incomplete, the corresponding results or recommendations will be inaccurate or incomplete. It remains your responsibility to notify Campbell Financial Partners of any changes in the information provided.