

Confidential Personal Questionnaire

UPDATED: _____

Taxable Investment Assets

Description	Current Value	Cost Basis	Annual Contribution	Owner	% Growth	Firm	Notes
Checking							
Savings							
Non Qualified Investments							

Tax-Deferred Assets (e.g. Annuities, old 401(k), etc.)

Description	Current Value	Cost Basis	Annual Contribution	Owner	% Growth	Firm	Notes

Current 401(k) or Qualified Plan

Description	Current Value	Owner	Annual Contribution	Match % or \$	% Growth	Firm	Notes
	Cost Basis	Roth/Trad	Rollover \$	Loan	Loan Payback	Loan %	
Description	Current Value	Owner	Annual Contribution	Match % or \$	% Growth	Firm	Notes
	Cost Basis	Roth/Trad	Rollover \$	Loan	Loan Payback	Loan %	

NOTES:

GWS&A

Adam L. Way, CFP®, ChFC®, AIF®, CLU®, CLTC

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Personal & Business Assets

Description	Current Value	Cost Basis	Annual Contribution	Owner	% Growth	Firm	Notes
Personal Home							

NOTES:

Personal & Business Assets



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Liabilities

Description	Amount Owed	Max Limit	Minimum Payment	Actual Payment	Person Liable	Interest Rate %	Time Remaining
TOTALS							

NOTES:

Liabilities

