

# Discover Session Intake Form



<b>Name</b>	
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<b>Who may we thank for introducing you to us?</b>

<b>What are you looking for from a Financial Advisor?</b>

<b>Tell us about your household (spouse, children, etc.)</b>

<b>What are your occupations/titles?</b>

<b>What are your financial goals? (check all that apply)</b>	
<input type="checkbox"/> Build a cash reserve	<input type="checkbox"/> Education planning
<input type="checkbox"/> Improve cash flow/budgeting	<input type="checkbox"/> Student loan repayment
<input type="checkbox"/> Start an investment portfolio	<input type="checkbox"/> Job transition
<input type="checkbox"/> Purchase real estate	<input type="checkbox"/> Estate planning
<input type="checkbox"/> Plan for financial independence	<input type="checkbox"/> Business planning
<input type="checkbox"/> Family planning	<input type="checkbox"/> Other: _____

<b>What is your approximate household income?</b>	
<b>How much do you have in total investable assets?</b>	
<b>What is the estimated total of your household debt?</b>	