Brown-Forman Financial Planning Questionnaire

REQUESTED DOCUMENTS (AS APPLICABLE):

- ☐ Personal Financial Statement
- ☐ Investment Statements (401(k), Brokerage, IRA, 529, etc.)
- ☐ Insurance Statements (Life, Disability, Long-Term Care)
- ☐ Estate Documents (Will, POA, Trust, etc.)
- ☐ UBS SSARs/PBRSUs Ledger, if applicable
- ☐ Prudential ESP Statement, Investments, Schedules
- ☐ Spouse's Benefit Summary/Documents, if applicable
- ☐ Most Recent Paystub
- ☐ Liability Statements (Mortgage, Car, etc.)
- ☐ Previous Year's Tax Return
- ☐ Wells Fargo 401(k) Statement
- ☐ Computershare ESPP Statement
- ☐ B-F Pension Estimates

	Name	Date of Birth	Phone	Email
Client:				
Spouse:				
Child:				
Child:				
Child:				
Child:				

Notes: ______________________________

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RESIDENCE:

Address: ______________________________

Value: ______________

Mortgage (Balance, Rate, Payment): $ ____________ ____ % $ ____________

GOALS: Client Spouse

At what age(s) would you like to retire? ______ ______

What are you plans for retirement? (Education Funding? Vacation Home? Weddings?):

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INCOME:

Source	Whose	Amount	Bonus
Salary:	____________________	$__________ /annual	$__________ /annual
Salary:	____________________	$__________ /annual	$__________ /annual
Other:	____________________	$__________ /annual	$__________ /annual

Notes: ____

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EXPENSES:

Average after-tax monthly spending: $____________

Average estimated leftover income after all savings, expenses, and taxes: $____________

Comments: ____

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BUSINESS INTEREST/RENTAL PROPERTIES (AS APPLICABLE):

Location: ____ Ownership %: _____________

Entity Type (Sole Proprietorship, LLC, S Corp, C Corp, Partnership): _____________________

Estimate or Actual Value: ____________________ Lease Income/Payments: _______________

Debt (Balance, Rate, Payment) $______________ _____% $________________________

Do you plan to sell with business? ____

If multiple, please attach schedules.