CONDON
WEALTH MANAGEMENT, LLC

Thank you for your interest in meeting with us.
Please take a moment to fill out the form below. The following information will help us begin to understand your financial picture and better assist you.

YOUR NAME: ______________________________

SPOUSE'S NAME: ______________________________

HOME PHONE: ______________________________

CELL / MOBILE: ______________________________

WORK PHONE: ______________________________

FAX NUMBER: ______________________________

EMAIL ADDRESS: ______________________________

SPOUSE'S EMAIL: ______________________________

MAILING ADDRESS: ______________________________

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DATE OF BIRTH YOU: ____________ SPOUSE: ____________

IF RETIRED ... DATE RETIRED (YOU): ______________________

DATE RETIRED (SPOUSE): ______________________

IF WORKING ... OCCUPATION (YOU): ______________________

TITLE (YOU): ______________________

PLANNED RETIREMENT DATE (YOU)? ____________

OCCUPATION (SPOUSE): ______________________

TITLE (SPOUSE): ______________________

PLANNED RETIREMENT DATE (SPOUSE)? ____________

WHAT IS THE MAIN REASON FOR YOUR VISIT TODAY?

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DO YOU CURRENTLY HAVE A FINANCIAL ADVISOR (NAME)? ____________________

DO YOU HAVE A CPA/TAX PREPARER (NAME)? ____________________

DO YOU HAVE AN ESTATE ATTORNEY (NAME)? ____________________

DO YOU HAVE AN INSURANCE AGENT (NAME)? ____________________

HOW DID YOU HEAR ABOUT CONDON WEALTH MANAGEMENT?

☐ FRIEND ☐ FAMILY MEMBER ☐ COLLEAGUE

☐ OTHER PROFESSIONAL ☐ INTERNET/WEB SITE

☐ OTHER: ____________________________________

IF YOU WERE REFERRED TO US, MAY WE ASK BY WHOM SO WE CAN THANK THEM?

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WOULD YOU LIKE TO SIGN UP FOR OUR E-NEWSLETTER? ☐ YES ☐ NO

WHAT ELSE SHOULD WE KNOW ABOUT YOU, YOUR GOALS, FAMILY, ETC?

ARE YOU A MEMBER OF ANY CLUBS OR ORGANIZATIONS?

WHAT ARE YOU PERSONAL INTERESTS (SUCH AS GOLF, COOKING, WINE?)

DO YOU HAVE ANY SPECIFIC QUESTIONS OR CONCERNS FOR ME?

Thank you for taking the time to fill us in!