

Client Review and Update Worksheet

Has any of your information changed?

Client: _____ Spouse: _____ Last: _____
 Cell: _____ Cell: _____ Address: _____
 Email: _____ Email: _____

New Items

- _____
- _____
- _____
- _____

Financial Changes

- _____
- _____
- _____
- _____

Goal Changes

- _____
- _____
- _____
- _____

I/We feel the economy is...	Better <input type="checkbox"/> Worse <input type="checkbox"/> The Same <input type="checkbox"/>
I/We feel the markets are...	Better <input type="checkbox"/> Worse <input type="checkbox"/> The Same <input type="checkbox"/>
Our monthly budget is..	Tight <input type="checkbox"/> OK <input type="checkbox"/> Great <input type="checkbox"/>
Our savings balances have ...	Grown <input type="checkbox"/> Stayed The Same <input type="checkbox"/> Shrunk <input type="checkbox"/>
I/We want to invest more...	Aggressively <input type="checkbox"/> Conservatively <input type="checkbox"/> The Same <input type="checkbox"/>
My/Our risk tolerance is...	Greater <input type="checkbox"/> Less <input type="checkbox"/> The Same <input type="checkbox"/>
My/Our rate of return...	Meets Expectations <input type="checkbox"/> Exceeds Expectations <input type="checkbox"/> Is Below Expectations <input type="checkbox"/>
Keeping up with my investments/accounts is...	Easy <input type="checkbox"/> Takes Some Effort <input type="checkbox"/> Too Hard <input type="checkbox"/>
Our Taxes for this Year will...	Go Up <input type="checkbox"/> Stay the Same <input type="checkbox"/> Decrease <input type="checkbox"/>

To Do List...

	Nathan <input type="checkbox"/>
	Client(s) <input type="checkbox"/>
	Nathan <input type="checkbox"/>
	Client(s) <input type="checkbox"/>
	Nathan <input type="checkbox"/>
	Client(s) <input type="checkbox"/>