RPG Advantage™

Initial Consultation Questionnaire

In Preparation for our Initial Meeting

We have two primary objectives for our initial meeting:

You need to learn about us – you will want to know our philosophies, values and capabilities. We will outline how we work with clients and what you can expect during the comprehensive wealth planning process. We will fully disclose our fee structure as it pertains to your individual needs.

We need to learn more about you – in order to determine how we might best serve you, we will want to know about your financial circumstances, goals, values, concerns and what you want out of an advisory relationship. You have certain responsibilities if our relationship is to be a success. For starters, we ask you to complete and return this form to us *before* we meet.

OVERVIEW QUESTIONNAIRE

Please describe your primary financial concerns. For example, why are you looking for a financial advisor?:

1. ____
2. ____
3. ____

What are you looking for in an advisor? What would a good relationship look like?

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How did you learn about Raskin Planning Group?

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Basic Information

	You	Spouse/Partner
Full Name		
Name you prefer		
Birthdate		
Employer		
Title/Position		
Work Address		
Work Phone		
Work Email		
Work Fax		
Cell Phone		
Home Address		
Home Phone		
Home Fax		
Home Email		
Preferred way For us to contact you	Work Mail____ Work Email___ Work Phone___ Home Mail___ Home Email___ Home Phone__	Work Mail ___ Work Email___ Work Phone___ Home Mail___ Home Email___ Home Phone__
Marriage	Anniversary #for you	#for Spouse
Children	Ages:	Ages:

Please return to
Raskin Planning Group
125 Summer Street, Suite 1400
Boston, MA 02110
617-728-7432

Fax to 617-728-7462