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與律師或會計師預約見面時，請帶下列文件:

1. 上兩年入息申報表 **(Past two years Income Tax Return)**
2. 所有股票及共同基金戶口月結帳單 **(Brokerage Statements)**
3. 所有退休金戶口月結帳單 **(IRA, 401(k) & Retirement Account Statements)**
4. 所有人壽保險及年金合約 **(Life Insurance & Annuity Policies)**

家庭資料 (Family Information)

Name (姓名) ______________________________ Age (年齡) ____歲 ☐ F 男 ☐FM 女

Social Security Number (工咭號碼)

Work Phone(工作電話) ________________ Cell Phone(手提電話) ________________

Spouse's Name (配偶姓名)________________________ Age (年齡) ____歲 ☐F 男 ☐FM 女

Social Security Number (工咭號碼)

Work Phone(工作電話) ________________ Cell Phone(手提電話) ________________

Address (地址) ____

Home Phone(住宅電話) ________________ Email ________________________________

Language (語言) ☐粵語 Cantonese ☐國語 Mandarin ☐英文 English ☐其它 Others

NOTES: (to be filled at meeting ____

____

____

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Children (兒女姓名)	M / F 男/女	Date of Birth (出生日期)

1. 財稅規劃基本問題

	Yes	No
您有沒有設立生前信託(Do you have a Living Trust)?	☐	☐
您有沒有設立遺囑 (Do you have a will)?	☐	☐
您有沒有出租相關物業(Do you have income from Real Estate)?	☐	☐
您有沒有會計師(Do you have an Accountant)?	☐	☐
您需要照顧子女或年老父母嗎? (Do you expect to care for a child or parent)?	☐	☐
您將會繼承一筆遺產嗎(Do you expect an inheritance)	☐	☐
您有沒有長期護理保險(Do you have Long Term Care protection)	☐	☐

您的股票存放在哪間公司 You invest your stocks in:

☐ Merrill Lynch ☐ TD Waterhouse ☐ Charles Schwab

☐ BankAmerica ☐ Fidelity Investment ☐ E-Trade

☐ Paine Weber ☐ Salomon Smith Barney ☐ Others

2. 財稅規劃目標 Financial Planning Objectives

您計劃/預計退休年齡 Retire Age 自己(you) ______ 配偶 (spouse) ______

請按照您對下列項目的關注程度:

	絕不關注 Not Concerned									十分關注 Very Concerned
為兒女籌備教育基金 (Planning for children)	1	2	3	4	5	6	7	8	9	10
為孫兒女籌備教育基金 (Planning for grandchildren)	1	2	3	4	5	6	7	8	9	10
減低現時入息稅(Reducing Current Income Tax)	1	2	3	4	5	6	7	8	9	10
遺產信託及遺產稅規劃(Estate Planning)	1	2	3	4	5	6	7	8	9	10
財富專業管理規劃 (Desire for Professional Management)	1	2	3	4	5	6	7	8	9	10
風險性投資管理(Maximum Growth)	1	2	3	4	5	6	7	8	9	10
穩健性投資管理 (Combined Growth & Income)	1	2	3	4	5	6	7	8	9	10

3. Home (住宅)

Address (地址)	Value(市價)	Mortgage(貸款)
	$	

4.Rental / Investment Real Estate (投資物業)

Address (地址)	Value(市價)	Mortgage(貸款)
	$	
	$	
	$	
	$	
	$	
	$	

5.Current / Future Income (入息)

Income (Salary, Wages, etc) (入息) You (自己) $ ______ Spouse (配偶) ______

Social Security (政府退休金) You (自己) $ ______ Spouse (配偶) ______

Pension (公司按月退休金) You (自己) $ ______ Spouse (配偶) ______

6. Bank Accounts (銀行戶口)

(儲蓄、定期存款、支票、Money Market)

Bank (銀行)	Interest Rate (利息)	Balance (餘數)	Matura Date (到期日)
	%	$	
	%	$	
	%	$	
	%	$	
	%	$	
	%	$	

7. Stocks & Bonds(股票及債券) In Non-Retirement Accounts

([illegible] Brokerage account statement)

Stock Brokerage Company (證券公司名字)	Original Investment (原本投資額)	Market Value (現時市值)
	$	$
	$	$
	$	$
	$	$
	$	$
	$	$
	$	$

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8. Mutual Funds (共同基金) In Non-Retirement Accounts

Fund Name (基金名字)	Original Investment (原本投資額)	Market Value (現時市價)
	$	$
	$	$
	$	$
	$	$
	$	$

9. IRA, 401(k), 403(B) & Other Retirement Accounts

([illegible])

Name of Company where the account is opened ([illegible])	Type 401k, IRA, 403b ([illegible])	Value ([illegible])
		$
		$
		$
		$
		$

10. Life Insurance ([illegible])

([illegible])

Insurance Company ([illegible])	Type([illegible]) (Term, Whole, VUL)	Death Benefit ([illegible])	Cash Value ([illegible])	Annual Premium ([illegible])

11. Annuities (年金[illegible]) Fixed and Variable

([illegible])

Insurance Co ([illegible])	Original Investment ([illegible])	Date Purchased ([illegible])

12. Long Term Care Insurance Policy / Rider: ____________________

下列資料只適宜信託專用

信託繼續執行人 (Successor Trustee)

姓名 (Name)	關係(Relationship)

[illegible] (Estate Distribution)