

YOUR OFFICE NAME
ADVISOR'S NAME

Financial Advice Avenue, Anytown, USA 12345
Phone: 800-555-1212 – Fax: 800-555-1213
www.ABCfinancialServices.com

CONFIDENTIAL QUESTIONNAIRE

Savings Bond Record Keeping Questionnaire

- Yes, I would like to have a personalized Savings Bond Performance Report™ prepared for me. Listed below is all the information needed to prepare my bond statement.

Name: _____

Address: _____

City: _____ State: _____ Zip Code: _____

Daytime Phone: _____ Today's Date: _____

If you would like us to make recommendations regarding your savings bonds, we will need to know more about your entire financial picture. Please fill in the following information so we may better understand how your savings bonds round out your portfolio of investments:

Age:

You _____ Spouse _____

Your Current Situation is (mark with 'X'):

___ Employed ___ Self-Employed ___ Business Owner

___ Unemployed ___ About to retire ___ Retired

Income From:

Social Security \$ _____ Pension \$ _____

Dividends \$ _____ Other \$ _____

Assets:

Home Value \$ _____ IRA \$ _____

Investments \$ _____ 401k \$ _____

Bank Account \$ _____ Other \$ _____

PLEASE SEE THE NEXT PAGE TO LIST YOUR SAVINGS BOND INFORMATION

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**THIS IS THE END OF OUR SAMPLE
MATERIALS FOR HANDOUTS...**

**THANK YOU FOR VIEWING OUR SAMPLE
INFORMATION ... Please contact us at
800-717-2663**

**OR ONLINE AT
<http://www.SBPlanner.com>**