

PIEDMONT STREET MANAGEMENT
85 PIEDMONT STREET
SAN FRANCISCO, CALIFORNIA 94117
415-731-2944

Personal Financial Questionnaire and Information Checklist

For each person (married couples or domestic partners may answer jointly):

- Name(s)
- Social Security Number(s)
- Date(s) of birth
- Citizenship
- Employer(s)
- Home address
- Home telephone and fax
- Business phone(s) and fax(es)
- Email address(es)

For each child/dependent:

- Name(s)

We will need to discuss your personal financial goals and concerns: retirement, education, special purchase, pay off large debt, and others.

We will need to discuss any of the following that may apply to you:

- Home ownership and mortgage
- Vacation or other real property
- Cash and savings accounts
- 401k accounts
- IRA accounts
- Deferred compensation accounts
- Family trust
- Brokerage account statements
- Mutual fund statements