

## Financial Notebook Interview

Provided by: John Planner, RFC®

Navigation: Welcome Personal Income Expenses Assets Liabilities Insurance Planning Final Steps

Personal

Overview Contact Information Other Individuals Occupations Filing Status

**Notes to Planner**

- Notes on Personal Information
- Notes on Income
- Notes on Expenses
- Notes on Assets
- Notes on Liabilities
- Notes on Insurance
- Notes on Planning

### Identifying Information

Please enter the following identifying information about yourself and your spouse.

	Yourself	Your spouse
First name	<input type="text"/>	<input type="text"/>
Middle initial	<input type="text"/>	<input type="text"/>
Last name	<input type="text"/>	<input type="text"/>
Birth date	<input type="text" value="5/29/1965"/>	<input type="text"/>
Gender	<input type="text" value="Unspecified"/>	<input type="text" value="Unspecified"/>
Social Security number	<input type="text"/>	<input type="text"/>
Do you smoke?	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No

Your Name appears here.

Notes and questions for you are easy to enter at any stage.

Client chooses either **Interactive Question & Answer format** or **Form entry**. Similar to other programs they may already have used.

## Financial Notebook Forms

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### Family Data

**Client A**

First Name:  M.I.:  Last Name:  Birth Date:  Gender:  SSN:  Smoker:  Y  N

Occupation:  Employer:  Date Started:  Retired:  Y  N Self-Employed:  Y  N

Business Phone:  Business Fax:  Email:

**Client B**

First Name:  M.I.:  Last Name:  Birth Date:  Gender:  SSN:  Smoker:  Y  N

Occupation:  Employer:  Date Started:  Retired:  Y  N Self-Employed:  Y  N

Business Phone:  Business Fax:  Email:

### Address

Street:

City:  State:  Zip:

Home Phone:  Home Fax:

# The BUILDER Suite

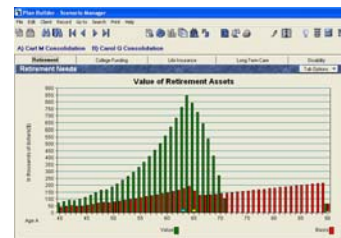
SOFTWARE, TRAINING & SUPPORT FOR FINANCIAL ADVISORS

## PlanBUILDER

Interactive, Real-time, Personal Financial Planning System

**FREE Demo** of Comprehensive Financial Planning Software

- Develop high quality comprehensive financial plans
- Create unlimited "what if" scenarios
- Present your solutions powerfully and swiftly
- Easily justify a substantial planning fee

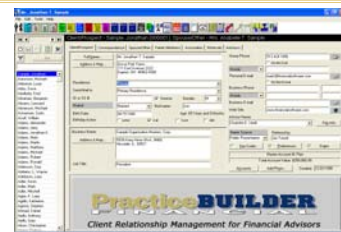


## PracticeBUILDER

Client Relationship Management Solutions for Financial Advisors

**FREE Demo** of Client Relationship Management Software

- Communicate more Effectively
- Use Technology to build "Top of Mind Awareness"
- Increase High Caliber Referrals
- Convert Referrals into prospects and into clients



## ClientBUILDER

Presenting Your Financial Services to Prospects

**FREE Demo** of Presentation of Fee-Based Services

- Establish the basis for requiring your professional help to create this plan.
- Step by Step personal financial planning process and why they need you.
- Provide a due diligence record of what you agreed to perform — and charge.
- Close the engagement with a profitable Plan Fee plus commission basis.



Name \_\_\_\_\_

Company \_\_\_\_\_

Address \_\_\_\_\_

City, State, Zip \_\_\_\_\_

Phone \_\_\_\_\_

E-mail \_\_\_\_\_

Financial Planning Consultants  
2507 North Verity Parkway  
P.O. Box 0430  
Middletown, OH 45042-0430

Phone: **800 666 1656 x13**  
Fax: 513 424 5752  
E-mail: Sales@FinancialSoftware.com  
Web: **www.FinancialSoftware.com**

### Method of Payment

- Check payable to Financial Planning Consultants, Inc.  
 Credit Card: *American Express, Discover, Master Card, Visa*

Card No. \_\_\_\_\_ Expiration \_\_\_\_\_

Signature \_\_\_\_\_

Plan Builder	\$ 995	_____
Financial Notebook	\$ 245	_____
Practice Builder		
Single User	\$ 995	_____
Advisor and Staff Version	\$1,495	_____
Small Firm Version	\$1,995	_____
Full Network Version	\$2,495	_____
Client Builder	\$ 795	_____
Shipping and Handling	\$ 15	_____
Subtotal		_____
Ohio Delivery, 6.5% Tax		_____
Total Due		_____