# Schreck Wealth Management Client Questionnaire - Short Version

Schreck
WEALTH MANAGEMENT LLC

**Name**
**Phone/Email**

## I. Goals

Retirement Savings
Retirement Income
Legacy for heirs
College Savings
Investing Goal
Insurance Planning
Maximize Tax Savings

## II. Financials- Stmnt of Cash Flows, Net Worth

Income
Expense
Net Worth
Is budgeting an issue?
Mortgage (int rate)
Other Liabilities (int rate)

## III. Investments/ Property- Statements

Retirement
Defined Benefit/Pension
Social Security
College Savings
Emergency Fund
Investments
Property

## IV. Insurance/Estate Planning- Policies, Trust Docs

Health Insurance/MC
Life Insurance
Disability Ins
Long-term Care
Will/Est. Plan

## V. Risk Tolerance

Discussion

## VI. Contacts

Accountant
Lawyer(s)
P & C Insurance
**Notes:**