ZENITH FP
PEAK OF FINANCIAL FREEDOM

Initial Intake Form

Please complete the information below and email to rey@zenithfp.com or upload via our secure link sent with this Intake Form. Thank you!

Name (Last, First, MI) ____

Phone (mobile) ____________ Email ______________________________________

Spouse Name (Last, First, MI) ____

Phone (mobile) ____________ Email ______________________________________

Address ____

City ______________________ State ______________ Zip ______________

What are your biggest financial concerns? ________________________________

Primary Questions for our team: ______________________________________

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Planned retirement date, or if retired, date of retirement ______________________

In order to advise you best, it is our approach to take a comprehensive look at your financial situation. This will be accomplished if you will provide complete statements (vs. screenshots) of the following documents:

- Company Plan Statements (i.e., 401k, 403b, 457, etc.)
- All Other Investment Account Statements
- Life Insurance and Long Term Care Insurance Statements (if available)
- Recent Tax Returns — all pages, for last year (PDF preferred)
- Estate Documents (i.e., Will, Trust, POA) (if available)
- Social Security Statements (if available)

Information provided on this form is kept strictly confidential.