



The Wehrheim Group, LLC

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Getting Started: Initial Interview Profile

In order for us to provide constructive feedback at our initial consultation it is essential that we focus on what is important to you. To get started, please complete the confidential Initial Interview Profile.

Fax the completed form to us at 319-294-3135.

Or, you may submit the completed form via mail to the address above. At our initial meeting, we will use this information to gain a deeper understanding of you and your expectations. By listening and asking questions, we will determine if our firm can be of service to you. If we can be of service, we will create an investment plan tailored to your specific needs and goals.

Background Information:

Your name: _____

Home address: _____

Home Phone: _____

Email Address: _____

Marital Status: _____ Age: _____

Occupation: _____ Annual Income: _____

Investment Planning Objectives and Concerns:

Instructions: Please indicate below those financial planning objectives that are important to you as well as any particular concerns you might have.

Objectives	Very Important	Somewhat Important	Not Important
Reducing Income Taxes			
Life Insurance Audit			
Investment Portfolio Review			
Retirement Planning			

Particular Concerns in Respect to Your Personal Finances: