

Client Questionnaire

The questionnaire and checklist should be completed in its entirety in order for us to provide you with a complete TFS™ Tax & Estate Planning *Well Check*. We recommend a full review and in many circumstances have been able to improve upon current pension plan structures, tax management strategies and business succession planning.

Estate Planning

Would you like to:

1. Review your current estate planning?
2. Better understand your estate planning?

Yes	No

Tax Planning and Asset Protection

Would you like to:

1. Reduce your income tax liability?
2. Review potential strategies for minimizing estate taxes?
3. Add or increase personal long term care or death benefits?
4. Better understand basic asset protection for your family?

Yes	No

Business Planning

Would you like to:

1. Review your business' health and its future market place?
2. Establish or improve a Pension Plan for retirement?
3. Review non-qualified tax plan tools for retirement & benefits?
4. Establish a buy-sell arrangement?
5. Evaluate strategic business exit strategies?

Yes	No

Family Information for the TFS™ Tax and Estate Plan *Well Check*

Name of Husband: _____ date of birth _____

Name of Wife: _____ date of birth _____

Address: _____

Telephone #: _____ Email address: _____

Number of children and ages: _____

Type of Business Entity (if applicable): C-Corp _____ S-Corp _____ Sole Prop _____

Partnership _____ or LLC _____ LLP _____ if LLC or LLP how taxed? _____

Fiscal Year End _____ (MM/YYYY) Any pension/retirement plan?: _____