



In preparation for your upcoming meeting with GrandView Financial Group, please complete the following information.

GENERAL INFORMATION

Full Name: _____

Age: _____ Self Employed: YES NO

Occupation: _____

Email: _____

Contact Number: _____

Spouse's

Full Name: _____

Spouse's

Age: _____ Self Employed: YES NO

Spouse's

Occupation: _____

ASSETS & LIABILITIES

Total Assets: \$ _____

Liquid Assets: \$ _____

Total Debts: \$ _____

Please list the financial topics you would like to discuss:

Securities and advisory services offered through LPL Financial, a registered investment advisor, Member FINRA/SIPC