SHAW & ASSOCIATES
CPAs & FINANCIAL ADVISORS

The Road to Financial Success: You Drive We Navigate

Thank you for requesting a consultation. Every effort will be made to make your experience enjoyable and productive. This consultation is being provided to help answer your questions and any concerns you might have. Please call 970-223-0792 or email dave@kevinshawcpa.com with any questions or if you have a scheduling conflict. Completed forms can be emailed, faxed to 970-223-6509 or brought with you to your meeting. Consultations will generally last an hour to an hour and a half. We look forward to meeting with you!

All information, whether written or verbal, is completely and permanently confidential.

Date:________________________

CLIENT INFORMATION

Client 1 Full Name_____________________________________ Date of Birth________________ Age_____

Client 2 Full Name______________________________________ Date of Birth________________ Age_____

Address____

City_________________________________ State_________ ZIP_________

2nd Address (if applicable)____

City_________________________________ State_________ ZIP_________

Client 1

Phone #1_______________ Home q Work q Cell q Phone #2_______________ Home q Work q Cell q

Email______________________________________ Home q Work q

Client 2

Phone #1_______________ Home q Work q Cell q Phone #2_______________ Home q Work q Cell q

Email______________________________________ Home q Work q

GOALS & OBJECTIVES

Please select topics that may be of concern for you, or for which you would like additional information.

q Current Income Needs	q Future Income Needs	q Retirement Planning
q Preserving your Portfolio	q Growing your Portfolio	q College Planning
q Putting together a Budget	q Debt Reduction/Consolidation	q Building an Emergency Fund
q Developing a Savings Plan	q Impact of Taxes on Investments	q Tax Efficient Investments
q Life Insurance Concerns	q Long Term Care Concerns	q Disability Concerns
q Gifting to Charities	q Gifting to Family	q Estate Planning
q Future Purchases	q Reviewing Company Benefits	q Roth Conversion Plan
q Start a Retirement Plan for Your Business	q Financially Assisting Aging Parents	q Mortgage Refinance Comparison

Ø List your priority topics or any questions you would like to address.

1) ____

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2) ____

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3) ____

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Ø What concerns, challenges or problems have you faced in the past that you would like to discuss?

1) ____

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2) ____

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3) ____

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Ø Do you currently have a working relationship with the following?

- o Financial Advisor q Yes q No
- o CPA/Accountant q Yes q No
- o Attorney q Yes q No
- o Insurance Agent q Yes q No
- o Mortgage Specialist q Yes q No