High Earner Wealth Assessment

Complete before your strategy session.

Contact Information

Full Name: ____________________

Email: ____________________

Phone: ____________________

Personal Information

Age: ____________

State: ____________

Marital Status: ____________

Dependents: ____________

Occupation

Executive / Engineer / Business Owner / Medical / Real Estate Investor / Other

Financial Snapshot

Annual Household Income: Under $150k | $150k-$250k | $250k-$500k | $500k+

401(k) Balance: Under $100k | $100k-$500k | $500k-$1M | $1M+

Roth IRA: Yes / No / Income Too High

Brokerage Account: Under $50k | $50k-$250k | $250k-$1M | $1M+

Monthly Investable Surplus: Under $500 | $500-$1k | $1k-$3k | $3k+

Primary Concerns

Taxes, Retirement Income, Market Volatility, Liquidity, Estate Planning, Business Succession, Insurance Review

Existing Coverage

Life Insurance: Yes / No / Not Sure

Employer Coverage: Yes / No / Not Sure

Disability Coverage: Yes / No / Not Sure

Final Question

What prompted you to explore advanced wealth and retirement strategies today?