



Raw Data (CIQ Advisor)

CIQ Account Name:
Client Name: *Joe Example*
Date: *02/24/2016*

Congratulations, your client completed the Client Information Questionnaire. Please see their responses below.

1. Please enter your full name:
Joe Example

2. What is your age?
40 - 49

3. Spouse
NA

4. Children
NA

5. Over the next 3 years do you expect your income to increase, decrease, or stay the same?
Increase

6. What was your gross household income last year?
\$250,001 - \$500,000

7. Without looking at your files, how much do you think you paid in income tax last year?
\$50,001 - \$100,000

8. Estimated Personal Net Worth
\$1,000,001 - \$5,000,000

9. Asset Classes

Other (Please Specify):

Business: *\$500,001 - \$1,000,000*

Stocks/Bonds: *\$500,001 - \$1,000,000*

Personal Real Estate: *\$500,001 - \$1,000,000*

Alternative Investments:

Commercial Real Estate: *\$1,000,001 - \$5,000,000*

10. How do your tax returns get done?
I have CPA or similar tax practitioner

11. How would you rate your tax practitioner?

Poor

12. Are you interested in having a CPA on my team do a free tax return review to see if there are other ways we can save you taxes?

Yes

13. Do you currently own life insurance?

Yes

14. Has a beneficiary review been performed on the policies?

Yes

15. Which type of insurance do you own?

Permanent

16. Do you currently have Long Term Care?

No

17. Did your parents or anyone you know need care due to age related physical or cognitive frailty?

Yes

18. Are there other areas of service you wish our office helped you with? (check all that apply)

Estate Planning,

19. Do you have any of the following types of accounts? (Check all that Apply)

Investment Account,

20. What is the total value in these accounts?

\$501,000 - \$750,000

21. Are you maxing out your contributions to these plans?

Yes

22. Do you own a business?

Yes

23. Please list your company's name:

Dell

24. How many companies do you own?

2

25. Please check the entity type for your primary business:

S-Corp

26. How many business partners do you have?

1

27. What percent of the company do you own?

28. Do you have a buy/sell agreement in place?

29. How many employees does this company have?
0-5
30. In one sentence, what does this company do?
Sell tech
31. What tools do you use for bookkeeping?
Xero,
32. When was your most recent company valuation done?
Within 2 Years
33. Which of the following accounts does your business have?
401k 403b Defined Benefit Plan or Defined Contribution Plan,
34. What was the gross company revenue last year?
\$1,000,001 - \$5,000,000
35. What was the net company revenue last year?
\$500,001 - \$1,000,000
36. What was the tax liability at the company level last year?
\$50,001 - \$100,000
37. What are your main business concerns?
Buisness Financing, Buisness Expenses,
38. Are there any other areas or services you wished our office helped with for your business?
Reviewing Additional Financing Options, Buisness Expenses Reduction,
39. Are you currently looking for any other professional relationships? (check all that apply)
Attorney,
40. Please provide any other updates or details that you feel would be relevant in our planning efforts moving forward.