WOOD | TARVER FINANCIAL

CONFIDENTIAL QUESTIONNAIRE

Please print and complete this form. Then, either scan and submit via email to Jordan Boyd at jordan.boyd@woodtarver.com or mail to 1101 W. River, Ste. #170, Boise, ID 83702.

Name (1) ____________________ Date of Birth ____________________

Spouse (2) ____________________ Date of Birth ____________________

Address ____________________ City __________ State __________ Zip __________

Mobile (1) ____________________ Mobile (2) ____________________

Email (1) ____________________ Email (2) ____________________

Date Retired/Planned (1) ____________________ Date Retired/Planned (2) ____________________

Employer (1) ____________________ Salary ____________________

Employer (2) ____________________ Salary ____________________

Children's Names & Ages ____________________

How Did You Hear About Us? ____________________

DO YOU HAVE A:

Financial Plan	☐ YES	☐ NO	*(If yes, please bring copy)*
Trust	☐ YES	☐ NO	*(If yes, please bring copy)*
Will	☐ YES	☐ NO	
Power of Attorney	☐ YES	☐ NO	
Life Insurance	☐ YES	☐ NO	
Long-Term Insurance	☐ YES	☐ NO	
Umbrella Liability Insurance	☐ YES	☐ NO	
Estate Planning Attorney	☐ YES	☐ NO	*Name* ____________
CPA	☐ YES	☐ NO	*Name* ____________
Financial Adviser	☐ YES	☐ NO	*Name* ____________
Emergency Savings	☐ YES	☐ NO	*Amount* ____________
College Savings Plan	☐ YES	☐ NO	

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ASSETS

	DESCRIPTION:	AMOUNT:
Retirement Accounts:	1)	$
	2)	$
	3)	$
	4)	$
Bank Accounts:		$
Investment Accounts:	1)	$
	2)	$
Other Assets:		$
Social Security:	1)	2)
Pension:	1)	2)

DEBTS

	RATE:
Type:	%
	%

Your primary reason for scheduling an appointment with Wood Tarver Financial?

List your top three financial and life objectives, goals, concerns or wishes:

PLEASE BRING A COPY OF ALL INVESTMENT & TAX STATEMENTS TO YOUR MEETING.

Signature Spouse Date

208.343.2001 | woodtarverfinancial.com | 1101 W. River Street, Suite 170 | Boise, ID 83702

It’s About You And Your Vision

Our firm is dedicated to your personal vision planning—whatever your vision may be. We will help you define your goals, implement a plan and monitor your progress. We utilize a holistic approach that looks at your needs, objectives, risk tolerance and goals along with tax and estate planning.

PARTNERSHIP WITH YOU

We provide recommendations based upon information you provide us about your personal needs, objectives and wishes. If we mutually decide to work together, you will be contacted by our team for regular reviews pursuant to our ongoing monitoring of your portfolio. Reviews provide opportunities to look holistically at your estate, tax and financial planning to make sure they continue to be optimized for you.

As partners, it is your obligation to notify us between reviews of any material changes altering the objectives or construction of your portfolio and general planning.

INVESTMENT PHILOSOPHY

Just as the personal vision planning is a comprehensive approach, so is our investment philosophy. We believe investments are simply tools for achieving your vision. Your portfolio is allocated based upon your personal needs, objectives, risk tolerance, tax situation & estate plan. We believe asset allocation is the most important factor in determining long-term performance and proactively monitor and update this with you. A long-term diversified investment approach based upon your personal asset allocation is utilized. Portfolios are monitored and updated once we have discussed recommendations with you. We do not use proprietary investments or standard models. Your plan and portfolio are based on your unique vision.

208.343.2001 | info@woodtarver.com
woodtarverfinancial.com

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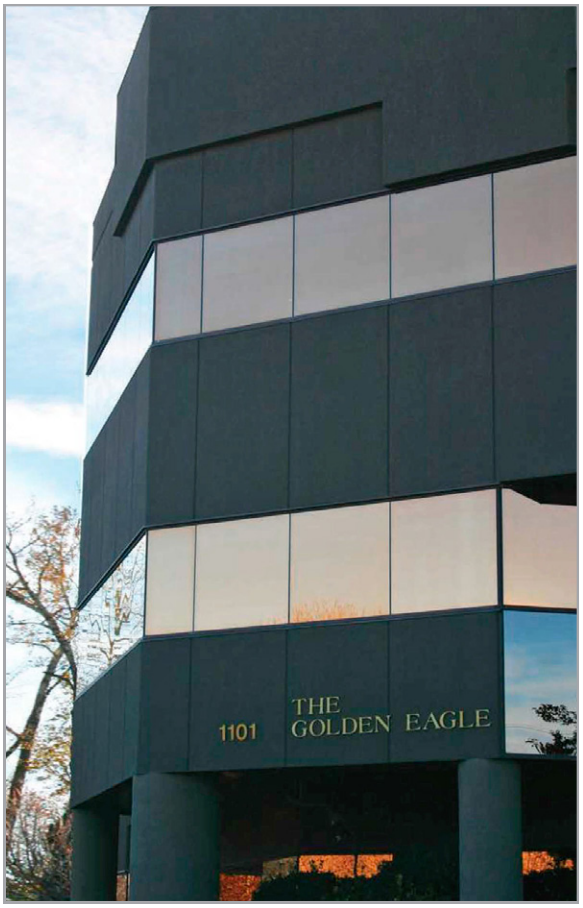
HELPING YOU RIDE INTO RETIREMENT
WOOD | TARVER FINANCIAL



DIRECTIONS TO OUR OFFICE

WOOD TARVER FINANCIAL
1101 W. River Street, Suite 170
Boise, ID 83702
(208) 343-2001

Office Location
We are located on the 1st floor of the Golden Eagle Building, which is located at the intersection of 11th Street and River Street
(Two blocks downstream from the Cottonwood Grille).

Directions: from West Boise
1. Travel east on the connector/I-184 (into downtown Boise)
2. Take the River Street Exit (last exit before downtown)
3. Turn right onto 11th Street
4. Our building is at the end of 11th Street (4 blocks)

Directions: from East Boise
1. Travel west on Front Street through downtown Boise
2. Turn left onto 11th Street
3. Our building is at the end of 11th Street (5 blocks)

A GUIDE TO YOUR FIRST APPOINTMENT

The goal of our first meeting is to get acquainted. You will have the opportunity to share your personal views and objectives about your financial situation. The meeting will be collaborative; we will seek to understand more about you and focus on circumstances, ambitions and expectations for a relationship with Wood Tarver Financial. We will explain our firm's capabilities and processes and determine how our services may best fit your needs.

The meeting is casual and free of charge. We invite you to ask questions throughout the discussion. You are under no obligation to pursue a relationship with us.

Helpful Documents To Bring:
- Confidential Questionnaire
- Wills, trusts
- Most recent account statements
  - Brokerage
  - Retirement (401k)
  - Savings
- Previous year's tax return