



3000 A Street, Suite 416
Anchorage, Alaska 99503
(907) 276-1900 Phone
(907) 276-7700 Fax
blunck@alaska.net

This questionnaire should be completed, as best you can, prior to our initial interview. By having this information available, Blunck Financial will be better able to determine the type of services you require and make the initial meeting more meaningful and useful. Please feel free to call us if you have any questions concerning this form or any other matters.

Please bring the following 3 things to our initial meeting: (1) your most recent income tax return, (2) copies of recent investment and account statements, plus a list of other assets and debts you have, and (3) a summary of your monthly income and expense (as best you can).

Date: _____

1) Name _____ Birthdate _____ Social Security # _____ - _____ - _____

Home Address _____

Telephone: Home _____ Work _____ Cell _____

Email Address _____ How often do you check your email? _____

Employer & Position _____ Estimated Annual Income \$ _____

Present Marital Status: Single ___ Married ___ Divorced ___ Widow(er) ___

Did you have any previous marriages? Yes ___ No ___

2) Name _____ Birthdate _____ Social Security # _____ - _____ - _____

Telephone: Home _____ Work _____ Cell _____

Email Address _____ How often do you check your email? _____

Employer & Position _____ Estimated annual income \$ _____

Present Marital Status: Single ___ Married ___ Divorced ___ Widow(er) ___

Did you have any previous marriages? Yes ___ No ___

• Do you own your own home? Yes ___ No ___

If so, what is the estimated value? \$ _____

If you have a mortgage, what is its estimated value? \$ _____ and interest rate? _____ %

• Do you have any children? Yes ___ No ___ Young children or adults? _____

• Any other Dependents? (for example dependent parents) Yes ___ No ___

• Please tell us how you heard about us, or who referred you to us.
