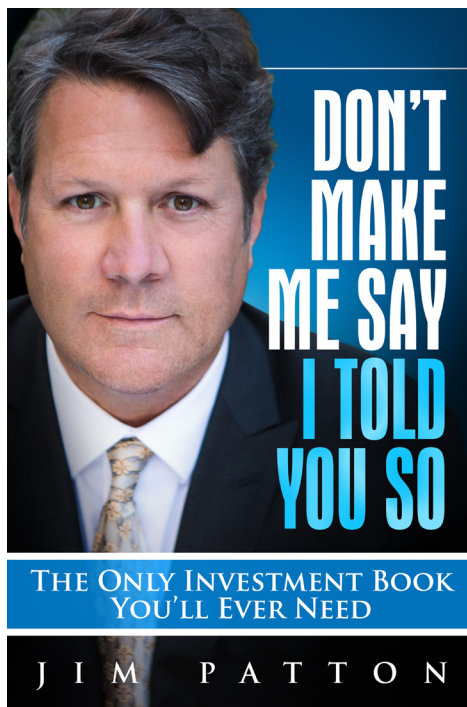


CONFIDENTIAL QUESTIONNAIRE



CHASEPARKFINANCIAL



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General Information

Your Name Date of Birth

Spouse's Name Date of Birth

Home Phone Work Phone

Email Address

Your Employer Occupation

Years with this company Anticipated Retirement Date I'm already retired

How do you rate your level of investment experience?
 Very experienced Above Average experience Average experience Little experience

What do you believe is the best investment you have ever made?

What do you believe is the worst investment you have ever made?

How do you feel about your current investment portfolio?

What is your biggest concern as you enter retirement?

How do you feel about your current financial advisor?

Current Investments

Non-Qualified Investments

Savings Certificates of Deposit None Mutual Funds None

Tax-free Bonds None Stocks None Other Investment Type

Qualified Investments

Total value of IRA accounts None Total value of spouse's IRA accounts None Total value of 401(k) plans None

Total value of spouse's 401(k) plans None Lump-sum pension None Spouse's lump-sum pension None

Fixed Income in Retirement

Pension Per Month Per Year

Spouse's Pension Per Month Per Year

Social Security Per Month Per Year

Spouse's Pension Per Month Per Year

Other Per Month Per Year

Description of "other" income

Desired Retirement Income

What amount of annual income would you like to have in retirement (after-tax) from all sources?

Rea Estate

Primary Residence

Estimated Value	Mortgage Balance		Interest Rate	Fixed or Variable	Year Mortgage Ends
	1st	2nd			
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Do you plan to remain in your existing home?
 Yes No Unsure

Rental Property

Estimated Value	Mortgage Balance	Interest Rate	Fixed or Variable	Year Mortgage Ends
<input type="text"/>	1st <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Second Residence

Estimated Value	Mortgage Balance	Interest Rate	Fixed or Variable	Year Mortgage Ends
<input type="text"/>	1st <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Do you have life insurance?
 Yes No

Do you have a living trust?
 Yes No

Do you have a will?
 Yes No

If yes, who is insured?

	Amount
1. <input type="text"/>	<input type="text"/>
2. <input type="text"/>	<input type="text"/>
3. <input type="text"/>	<input type="text"/>
4. <input type="text"/>	<input type="text"/>

Is there any other relevant information which may help us in our analysis?

Please send a recent copy of all current investment account statements.