



Personal Information

Client 1	First	Middle	Last	Nickname	D.O.B.
	Preferred email		Mobile Phone #		
	Employer		Title/Position	Work Phone	Fax
Client 2	First	Middle	Last	Nickname	D.O.B.
	Preferred email		Mobile Phone #		
	Employer		Title/Position	Work Phone	Fax
Anniversary Date					
Primary Home Address					
City		State	Zip	Primary Home Phone #	
Secondary Home Address					
City		State	Zip	Secondary Home Phone #	
Attorney Name / Contact Information			CPA Name / Contact Information		
Child/Grandchild/Other Name(s)		Relationship	Date of Birth	Comments/School/Needs	
1.					
2.					
3.					
4.					
5.					
6.					

GATIEN STRATEGIC WEALTH MANAGEMENT, A member of D.A. Davidson & Co.
 cgatien@dadco.com | DIRECT: (425) 467-2241 | gatienstrategicwealthmanagement.com

CAREFUL PLANNING | DISCIPLINED INVESTING | CONFIDENTLY ON COURSE

D.A. Davidson & Co. member SIPC | 10400 NE 4th Street, Suite 400 | Bellevue, WA | (425) 467-2200 | dadavidson.com

Lifestyle Goals

Lifestyle Goals are above and beyond what you need to pay for basic expenses. Rate the importance of each Goal on a scale of 10 ←→ 1. This will identify your goals by Needs (10, 9, 8), Wants (7, 6, 5), and Wishes (3, 2, 1).

Most Common Goals			Other Goals		
Car	College	Wedding	New Home	Celebration	
Travel	Home Improvement	Major Purchase	Start Business	Provide Care	
Health Care	Gift or Donation	Leave Bequest	Private School		

Importance High Low 10 ←→ 1	Description	When	Target Amount	How Often	How Many Times
10	Basic Living Expenses	At Retirement			

Risk Score

How much market risk are you willing to accept? On a scale of 1 to 100, with 1 being the lowest risk and 100 being the highest risk, what is your risk score?

Household	Client 1	Client 2

Two-thirds of all investors score between 40 and 60, and only 1 in 1,000 select a score lower than 20 or greater than 80. Does your score feel right as you compare yourself to others?

	Household			Men			Women		
Age Group	> 64	50-64	< 50	> 64	50-64	< 50	> 64	50-64	< 50
Avg. Score	47	50	64	50	54	59	45	48	52