

# F.O.R.M. Gathering Guidelines

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## **FAMILY**

- Spouse (who, how long, how they met, milestone anniversary)
- Children (names, ages, interests, accomplishments)
- Grandchildren (names, ages, interests, accomplishments)
- Pets (how many, what type, names)
- Health Issues or other Special Situations

## **OCCUPATION**

- Occupation (client and spouse, for how long, where)
- Retirement (retired or retirement goal date - of client and spouse)
- Business Owner (type, how long, long-term intentions, etc.)
- Professional education and/or credentials
- Professional successes and/or accomplishments

## **RECREATION**

- Sports and Recreation (play, coach, fan of)
- Personal Interests (hobbies and interests)
- Music (play it, listen to it, types)
- Reading (favourite types of books, favourite authors, reading club)
- Favorite Traditions (occasions, celebrations, reunions)
- Travel (seasonal/annual, favourite place)
- Visit cottage or vacation home regularly – or a boater?
- Charities and other causes supported (volunteer and support)
- Service Clubs and Organizations (member or participant)
- Alumni of (Universities, associations)



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## **MONEY**

- Financial Goals and Objectives
- Tax Planning
- Retirement Planning
- Cash Flow Planning
- Educational Savings
- Family Security
- Estate Planning
- Investment Strategies

The area of MONEY is covered in more detail  
in the New & Existing Client Processes

