



PACIFIC ASSET MANAGEMENT

A Registered Investment Advisor

Phone 360.876.1938

Fax 360.876.0823

Office 1590 Bay Street
Port Orchard, WA 98366

Web pacificasset.com

Don Cox / Founder
Senior Investment Advisor

Gary Lucy / Founder
Senior Investment Advisor

Brian Cox
Investment Advisor

Alison Fong
Operations Manager

Prospective Client Questionnaire

Your completion of this confidential client questionnaire will assist Pacific Asset Management in understanding your financial needs. This form is used only by Pacific Asset Management. Your information is always kept private.

NAME _____ DATE _____

SPOUSE / PARTNER'S NAME _____

ADDRESS _____ CITY _____ STATE _____ ZIP _____

HOME PHONE _____ WORK PHONE _____

EMAIL _____

How did you hear about us?

Are you managing your own portfolio or is someone assisting you?

If someone is assisting you, why are you interested in terminating the relationship?



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What are you hoping we can do for you?:

What is the size of your investment portfolio, or how much do you want to invest?:

Are you retired? yes no

Is your partner retired? yes no

If not, when do you plan to retire?

Please return this form via email, or print and fax it to 360.876.0823

Thank you