# Discovery Interview

*Sera Capital Management, LLC*

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SERA CAPITAL

## About You

*Client* | *Spouse / Co-Client* | *Date* ______

Name

Date of Birth

Phone Number

Email Address

Employer & Job Title

Years Worked There

Est. Retirement Age

Home Address

Children's Names and Ages:

Goals

Hobbies

How did you find us?

Do you have a will? Yes ◯ No ◯ Do you have a CPA? Yes ◯ No ◯

## Income

*Client* | *Spouse / Co-Client*

Annual Gross Salary

Social Sec. Amt. & Age

Pension Amt. & Age

Other Income

## Expenses

Monthly Expenses Estimate
(average, including non-recurring items)

## Assets

*Client* | *Spouse / Co-Client*

Retirement Savings / Yr.

Current 401(k), 403(b)

Previous 401(k), 403(b)

IRA / Roth Balances

Other Stocks / Funds

Cash / Bank Accounts

Life Insurance

College Savings

Home Value

Other Property

## Debts *(with interest rates, if known)*

Mortgage Balance & Payment

Vehicle Loan(s)

Credit Cards

Student Loans

Other Liabilities

## Additional Information

Curious about what to expect in your first meeting?

**What additional topics would you like to discuss?**

**Items to Send in Advance** (if available): Financial Statements (i.e. 401(k), 403(b), IRA, Roth, Personal Investments), Pension & Social Security Statements (or Social Security Estimates), and Insurance Policy Statements

**Please send this form with the documents listed above via one of the below:**

Secure Upload: Upload Files Here Email: contact@seracapital.com Phone: (443) 873-1440

**1910 Towne Centre Blvd Suite 250 Annapolis MD 21401**