FRACTIONAL
PLANNING

Sample CRM Client Notes Format

(This is just a suggestion)

Demographic and Family Data

Names, dependents, DoB’s, planning concerns (special needs? Aging parents?)

Values and Aspirations

Perceived Roadblocks

Quantifiable Goals

What age to plan for being “work optional” or retirement?
Goal #1 - <target date, target dollar amount, priority (need/want/wish), etc>
Goal #2 - <target date, target dollar amount, priority (need/want/wish), etc>
Goal #3 - <target date, target dollar amount, priority (need/want/wish), etc>

Income

Expenses

Tax Concerns

Assets

Liabilities

Insurance

Estate