



As of: _____

Personal Questionnaire

As you may know, Capital Wealth Management enjoys doing things for our clients on a personal level, and this information will be kept strictly confidential.

Please complete and return the following questionnaire.

To scan and send your response by email:

evan@capital-wm.com

To send your response by mail:

Capital Wealth Management
1401 Dove Street, Suite 110
Newport Beach, CA 92660
Attn: Evan Ocepek

Client 1

Client 2

Which type of coffee do you prefer?

Regular No Preference
 Decaffeinated I don't drink coffee

Which type of coffee do you prefer?

Regular No Preference
 Decaffeinated I don't drink coffee

Which type of chocolate do you prefer?

Milk Chocolate No Preference
 Dark Chocolate Don't eat chocolate

Which type of chocolate do you prefer?

Milk Chocolate No Preference
 Dark Chocolate Don't eat chocolate

What is your favorite music genre?

1) _____ 2) _____

What is your favorite music genre?

1) _____ 2) _____

Who are your favorite musicians / bands?

1) _____ 3) _____
2) _____ 4) _____

Who are your favorite musicians / bands?

1) _____ 3) _____
2) _____ 4) _____

What sports do you play? I don't play sports.

1) _____ 3) _____
2) _____ 4) _____

What sports do you play? I don't play sports.

1) _____ 3) _____
2) _____ 4) _____

What is your favorite sports team?

1) _____ *Season tickets?* YES NO
2) _____ *Season tickets?* YES NO
3) _____ *Season tickets?* YES NO

What is your favorite sports team?

1) _____ *Season tickets?* YES NO
2) _____ *Season tickets?* YES NO
3) _____ *Season tickets?* YES NO

Do you enjoy the theater? YES NO

Do you enjoy the theater? YES NO

Who are your favorite authors?

1) _____ 2) _____

Who are your favorite authors?

1) _____ 2) _____

What are your favorite restaurants?

1) _____ 2) _____

What are your favorite restaurants?

1) _____ 2) _____

Hobbies: *(other than those listed above)*

1) _____ 3) _____
2) _____ 4) _____

Hobbies: *(other than those listed above)*

1) _____ 3) _____
2) _____ 4) _____

In what groups, organizations, and/or charities do you participate?

1) _____
2) _____
3) _____

In what groups, organizations, and/or charities do you participate?

1) _____
2) _____
3) _____