

CLIENT INTEREST QUESTIONNAIRE

Name _____ Preferred Name _____
 Address _____ Email Address _____
 Phone _____ mobile or home Employer _____

Do you receive texts? Yes No

Spouse Information

Wedding Anniversary (if applicable) _____

Name _____ Preferred Name _____
 Address _____ Email Address _____
 Phone _____ mobile or home Employer _____

Do you receive texts? Yes No

What hobbies do you enjoy? _____

Favorite sports teams _____

Are you on Facebook? Yes No Do you follow KWMG on Facebook? Yes No

Are you on LinkedIn? Yes No Do you follow KWMG on LinkedIn? Yes No

Are you a wine drinker? Yes No Are you a beer drinker? Yes No

Are you a Veteran? Yes No Do you play golf? Yes No

Do you play any sports for recreation? _____

Favorite candy _____

Which client events would you be most interested in attending? (Select all that apply)

- | | |
|---|---|
| <input type="checkbox"/> Baseball Game | <input type="checkbox"/> Escape Room |
| <input type="checkbox"/> Ice Hockey Game | <input type="checkbox"/> Ice Cream Social |
| <input type="checkbox"/> Wine Tasting or Making | <input type="checkbox"/> Educational Dinner |
| <input type="checkbox"/> Beer Tasting or Making | <input type="checkbox"/> Flower Arranging Class |
| <input type="checkbox"/> Movie Event | <input type="checkbox"/> Charcuterie Board Class |
| <input type="checkbox"/> Theatre or Musical Event | <input type="checkbox"/> Participate in Group Sports Activity (pickleball, cornhole, etc) |
| <input type="checkbox"/> Cooking Class | <input type="checkbox"/> Other _____ |

What is your favorite Thanksgiving pie?

- | | | |
|----------------------------------|--|---------------------------------------|
| <input type="checkbox"/> Apple | <input type="checkbox"/> Chocolate Cream | <input type="checkbox"/> Cherry |
| <input type="checkbox"/> Pumpkin | <input type="checkbox"/> Pecan | <input type="checkbox"/> Other: _____ |

Please email completed questionnaire: info@kingstonwm.com

Mail: Kingston Wealth Management Group, 152 Deming Street, South Windsor, CT 06074