

Customer Assessment Form

(Financial Services)

A **customer assessment form** sample for financial services helps evaluate client needs and financial status efficiently. It ensures accurate data collection, enabling personalized financial advice and risk assessment. Using a structured form enhances compliance and improves customer experience.

Personal Information

Full Name

Date of Birth

Email Address

Phone Number

Financial Profile

Annual Income

Employment Status

Estimated Net Worth

Outstanding Liabilities

Financial Goals & Risk Assessment

What are your main financial goals?

Please select your risk tolerance

Interested Financial Services (select all that apply)

Investments
Retirement Planning
Insurance
Tax Planning
Estate Planning
Loans & Credit



Other Comments or Needs

Submit Assessment