

## More Detailed Instructions

You will need Adobe Acrobat Reader installed on your computer to complete this process.

### Instructions to Download and Submit Forms

#### Step 1: Download each of the interactive PDF files.

[Initial Interview Form \(PDF\)](#)

[Simple Financial Statement \(PDF\)](#)

[Financial Satisfaction Survey \(PDF\)](#)

[Life Transitions Survey \(PDF\)](#)

1. Click on the file name and it will open in a new window.
2. Click the download button (usually a small downward arrow, found in the top right corner).
3. Save the file to your computer.
  - a. Select the desktop folder from the left menu bar.
  - b. Click the save button.
4. You should repeat this process for each of the files listed above. When you are finished you will have all four files saved on your desktop.

#### Step 2: Complete the forms.

If you prefer to handwrite your answers please print the forms and fill in your information.

If you would like to fill them out on the computer and email them to us, please follow the instructions below.

1. Go to your desktop and locate the files you just saved.
2. Double click on the file to open it.
3. Complete the form. This is a fillable PDF, so you are able to type your answers directly into the form.
4. Save the completed form.
  - a. Click on 'File' from the top menu bar.
  - b. Click on 'Save As' from the drop down list.
  - c. Selecting the desktop folder from the left menu bar.
  - d. Rename the file by **adding your first initial and last name to the end of the 'File Name'**.

- e. Click the save button.
  - f. Close the PDF.
5. You should repeat this process for each of the files listed above. When you are finished you will have all four completed files saved on your desktop with *your name* as part of the file name.

*For couples each partner should complete the Financial Satisfaction Survey and Life Transitions Survey individually.*

**Step 3: Submit the completed forms to our office.**

If you have handwritten your answers, you may fax the forms to our company at (360) 336-6528.

If you have typed your answers, you can email the completed forms ***with your first initial and last name at the end of the 'File Name'*** to [info@soundfinancialplanning.net](mailto:info@soundfinancialplanning.net).