Apex Wealth Blueprint

Client Intake Questionnaire

This is an editable form. Open it in any modern PDF viewer (Adobe, Preview, Firefox), fill the fields directly on-screen, save, and email the completed file to hello@pbxicapital.com. This intake is unique to PBXI Capital — it maps your priorities across the three PBXI divisions (Apex investments, Acres real estate, Awning remodel & lifestyle) so your advisor can design a plan that reflects the whole household, not just one account.

01 About You

FULL LEGAL NAME

PREFERRED NAME

DATE OF BIRTH

STATE / REGION

HOUSEHOLD STAGE

EMAIL

MOBILE

OCCUPATION

HOUSEHOLD STRUCTURE

☐ Single ☐ Partnered ☐ Married ☐ Blended ☐ Widowed

PEOPLE FINANCIALLY CONNECTED TO YOU (PARTNER, CHILDREN, PARENTS, OTHERS)

Name	*Relationship*	*Age*	*Reliance (none/partial/full)*

02 What Matters to You

IN YOUR OWN WORDS, DESCRIBE THE LIFE THIS PLAN SHOULD HELP MAKE POSSIBLE OVER 5, 15, AND 30 YEARS.

RANK EACH PRIORITY (1 = LOW, 5 = HIGH). ADD ROWS FOR ANYTHING WE MISSED.

Priority	*Rank (1–5)*	*Target year*	*Estimated cost / income*

03 Across the PBXI Divisions

Tick the areas where you'd like the plan to actively involve each PBXI division.

APEX — INVESTMENTS

☐ Portfolio review ☐ Retirement plan ☐ Tax strategy ☐ Estate & legacy ☐ Alternatives

ACRES — REAL ESTATE

☐ Primary home ☐ Second home ☐ Rental portfolio ☐ Sell a property ☐ 1031 exchange

AWNING — REMODEL & LIFESTYLE

☐ Remodel budget ☐ Aging-in-place ☐ Vacation home build ☐ Rental turnover ☐ N/A

04 Risk & Behavior

INVESTING TEMPERAMENT

☐ Preserve ☐ Balanced ☐ Growth ☐ Aggressive

A 20% MARKET DROP THIS YEAR WOULD FEEL

☐ Unacceptable ☐ Uncomfortable ☐ Expected ☐ An opportunity

DECISION STYLE WHEN MARKETS ARE NOISY

☐ Rely on advisor ☐ Decide together ☐ Direct my own moves

CASH YOU WANT ON HAND

☐ < 3 months ☐ 3–6 months ☐ 6–12 months ☐ 12+ months

05 Income & Savings Today

HOUSEHOLD GROSS INCOME	ANNUAL SAVED / INVESTED	EFFECTIVE TAX RATE (EST.)	ANNUAL CHARITABLE GIVING

RECURRING OR EXPECTED FUTURE INCOME (PENSIONS, SOCIAL SECURITY, RENTAL, ROYALTIES, DISTRIBUTIONS)

Source	*Owner*	*Monthly amount*	*Starts (year)*	*Ends (year)*

06 Balance Sheet Snapshot

INVESTMENT & RETIREMENT ACCOUNTS (APEX OR HELD ELSEWHERE)

Institution	*Account type*	*Owner*	*Value*	*Annual contribution*

REAL ESTATE & TANGIBLE ASSETS

Property or asset	*Use (primary / rental / other)*	*Estimated value*	*Debt against it*

BUSINESS OR PRIVATE-MARKET INTERESTS

Entity	*Ownership %*	*Est. value*	*Planned event*

LIABILITIES

Description	*Rate & type*	*Balance*	*Monthly payment*	*Payoff target*

07 Protection & Structure

INSURANCE IN PLACE

☐ Life ☐ Disability ☐ Long-term care ☐ Umbrella ☐ None

LEGAL DOCUMENTS IN PLACE

☐ Will ☐ Revocable trust ☐ Power of attorney ☐ Healthcare directive ☐ None

BENEFICIARIES REVIEWED IN LAST 24 MONTHS?

☐ Yes — all ☐ Partially ☐ No ☐ Unsure

EXISTING PROFESSIONALS WE SHOULD COORDINATE WITH

Name	*Firm*	*Role*	*Best contact*

08 Values & Non-Negotiables

THEMES TO BUILD THE PLAN AROUND — FAMILY PHILOSOPHY, CAUSES, INDUSTRIES TO AVOID, RED LINES

09 How You'd Like PBXI to Show Up

PREFERRED CONTACT

☐ Email ☐ Phone ☐ Text ☐ In-person

REVIEW CADENCE

☐ Quarterly ☐ Semi-annual ☐ Annual ☐ As-needed

REPORTING STYLE

☐ High-level ☐ Detailed ☐ Live dashboard ☐ You recommend

10 Anything Else We Should Know

This questionnaire is an intake tool for discussion with your PBXI Capital Apex advisor. It is not investment, tax, or legal advice. Information you provide is kept strictly confidential and used only to prepare your Apex Wealth Blueprint.