

Prospect Onboarding Questionnaire – Template

Please complete the sections that apply to you or your firm. Fields can be expanded as needed.

1. Contact & Firm Information

Primary Contact Name:	
Title/Role:	
Email:	
Phone:	
Company Legal Name:	
Entity Type / State:	
Website:	

2. Services Needed (check all that apply)

<input type="checkbox"/> AI FinTech Operations	Notes:
<input type="checkbox"/> Financial Planning Firm Management	Notes:
<input type="checkbox"/> Life & Health Insurance Agency Management	Notes:
<input type="checkbox"/> Alternative Assets & Collectibles	Notes:

3. Operations Snapshot

Briefly describe your current operating model, systems, and pain points.

--

4. Compliance & Data

Describe any licensing requirements, compliance timelines, and data retention or privacy considerations.

5. Goals & Timeline

Objectives / KPIs:	
Target Start Date:	
Critical Deadlines:	
Stakeholders:	
Budget Range:	

6. Attachments

List any documents you'll send separately (e.g., org chart, sample reports, workflow diagrams).

Notes

Send completed forms to info@rusticresources.example or use the secure upload link provided by your advisor.