



Client Information

Please assist us in making sure that our records reflect the most up to date information. Thank You

Full Legal Name: _____ Spouse Full Legal Name: _____

Home Phone

Cell Phone

Email address

Home Address

Mailing address (if different)

Marital Status (circle one)

Single Married Divorced Widowed

Anniversary:

Do you have children?

Y N How many?

Children's age(s):

Personal/Financial Details

You

Spouse

Birth Date

Social Security #

Driver License # & State

DL Issue date & Exp Date

US Citizen

Y N

Y N

Retired

Y N

Y N

Social Security Pymt

\$/mo

\$/mo

Pension Pymt

\$/mo

\$/mo

Employer Name

Job Title or Description

Work Phone

Employer Address

Total Annual Income

\$

\$

Annual Expenses	\$	
Net Worth (excluding home)	\$	
Value of Home?	\$	Current Mortgage Amt \$
Liquid Net Worth	\$	

Will	Y	N		Y	N
Trust	Y	N		Y	N
Power of Attorney	Y	N		Y	N
Living Will/Hlth Care Surrogate	Y	N		Y	N
Long Term Care Insurance	Y	N		Y	N
Life Insurance	Y	N		Y	N
Health Insurance	Y	N		Y	N
Umbrella Liability Policy	Y	N		Y	N
Disability Insurance	Y	N		Y	N

Investment Objective (circle one)	Current Income	Balanced	Growth & Income	Growth	Max Growth
-----------------------------------	----------------	----------	-----------------	--------	------------

Investment Purpose (circle all that apply)	Save for Education	Generate Income	Preserve Wealth
	Retirement Purposes	Accumulate Wealth	Market Speculation

Investment Time Horizon in years	Save for Short term Goals
Other:	

Investment Knowledge (circle one)	<5	5-10	10-20	20+
-----------------------------------	----	------	-------	-----

Risk Tolerance (circle one)	None	Limited	Good	Extensive
-----------------------------	------	---------	------	-----------

	Conservative	Moderately Conservative	Moderate
	Moderately Aggressive	Aggressive	Speculative

Investment Experience in Years	Mutual Funds _____	Stocks _____	Bonds _____	Limited Prtnshp _____
	Variable Annuities _____	Options _____	Fixed Annuities _____	

Trusted Contact Info	Name:	Relationship:
	Phone:	

Securities offered through Securities America, Inc., Member FINRA/SIPC. Advisory services offered through Securities America Advisors, Inc. Cornerstone Wealth Management and Securities America are separate entities.