

Client Data Sheet:

Client Number: _____ New _____ Update



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Building financial and tax strategy for your future

Advisor: Danny Melinda

1. Client Information

First _____ MI _____ Last _____

Title _____ Nickname _____ Gender: M F X

SS# _____ Date of Birth _____

DL# _____ State _____ Issue Date _____ Expiration Date _____

Address: _____

Home Phone _____ Work Phone _____ Cell _____

Email _____ Email 2: _____

Preferred Method of Contact: Home Phone Cell Phone Work Phone Email Text

Employer: _____ Occupation: _____

Employer Address: _____

Referred By: _____

2. Spousal Information

First _____ MI _____ Last _____

Title _____ Nickname _____ Gender: M F

SS# _____ Date of Birth _____

DL# _____ State _____ Issue Date _____ Expiration Date _____

Address: _____

Home Phone _____ Work Phone _____ Cell _____

Email _____ Email 2: _____

Preferred Method of Contact: Home Phone Cell Phone Work Phone Email Text

Employer: _____ Occupation: _____

Employer Address: _____

3. Wedding Anniversary: _____

4. Preferred Method to Receive Newsletter: Mail Email



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5. Dependent / Other Beneficiary Information

First _____ MI _____ Last _____

SS# _____ Date of Birth _____ Relationship: _____

First _____ MI _____ Last _____

SS# _____ Date of Birth _____ Relationship: _____

First _____ MI _____ Last _____

SS# _____ Date of Birth _____ Relationship: _____

First _____ MI _____ Last _____

SS# _____ Date of Birth _____ Relationship: _____

6. Financial Information

A. Investment Objective: Income _____ Growth and Income _____ Growth _____ Speculation _____

B. Risk Tolerance: Conservative _____ Moderate _____ Aggressive _____

C. Annual Income (all sources, A-H from Table 1): _____

D. Net Worth - Excluding Residence (A-H from Table 1): _____

E. Liquid Assets (A-H from Table 1): _____

F. Estimated Investment Range (A-F from Table 2): _____

G. Investment Objective: (Check answer on chart below)

Table 1		Table 2		Investment Objective (G)	
A: \$0	- \$49,999	A: Less than \$25,000			A: Income & Conservative
B: \$50,000	- \$99,999	B: \$25,000 - \$39,999			B: Growth & Income + Conservative
C: \$100,000	- \$199,999	C: \$40,000 - \$49,999			C: Growth & Moderate
D: \$200,000	- \$499,999	D: \$50,000 - \$64,999			D: Growth & Income + Moderate
E: \$500,000	- \$999,999	E: \$65,000 - \$124,999			E: Growth & Long Term
F: \$1,000,000	- \$4,999,999	F: Over \$125,000			F: Income & Moderate
G: \$5,000,000	- \$9,999,999				G: Trading & Speculation
H: \$10,000,000 +					H: Growth & Conservative
					I: Income & Long Term
					J: Growth & Income + Long Term

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