Balance WEALTH ADVISORS

balancewealthadvisor.com
Wellesley, MA - Providence, RI | 877-903-7222

PROFESSIONAL RELATIONSHIPS

Apr-20

Human Resource Contact:

Company Name/Employer Name

Telephone

Email

We have found that in many cases it is easier for us to go directly to your company with questions related to your benefits. Additionally, they may forward the info directly to you in which case please pass along to us. In most cases, an email introduction helps the process.

Financial Advisor:

Address

City, State & Zip Code

Telephone

Email address

Is this someone you would recommend that we refer other clients to? Yes ☐ No ☐

Last meeting date:

How many years have you been working with them?

How do you pay for their services?

CPA/Accountant:

Address

City, State & Zip Code

Telephone

Email address

Is this someone you would recommend that we refer other clients to? Yes ☐ No ☐

Last meeting date: *Approximate cost:*

How many years have you been working with them?

Estate Planning Attorney:

Address

City, State

Telephone

Email

Is this someone you would recommend that we refer other clients to? Yes ☐ No ☐

Last meeting date: *Approximate cost:*

When was the last time you met with your attorney? *Purpose?:*

Mortgage Broker:
Address
City, State
Telephone
Email
Is this someone you would recommend that we refer other clients to? Yes ☐ No ☐
Last meeting date:
How many times have you refinanced or bought property in the last 10 years?
(Real Estate Agent , P&C Insurance Agent, College Advisor)
Other Professionals or 3rd party:
Address
City, State
Telephone
Email
Is this someone you would recommend that we refer other clients to? Yes ☐ No ☐
Last meeting date: *Approximate cost:*

RELEASE OF CLIENT INFORMATION

Apr-20 Financial Advisor: David Allen & the BWA team

My financial advisor may give and/or share information regarding my LPL account(s) and or Goal Tracking information to my/our tax adviser/attorney or other third party, identified above. Any information pertaining to my/our account(s) with Balance Wealth Advisors, including, but not limited to copies of monthly statements and tax information letters can be provided to my/our attorney/tax adviser or other third party.

My financial advisor may also request information pertaining to myself that is relevant to performing his/her financial advisory duties. This information held by my company benefits department, my attorney/tax adviser or other third party may include but is not limited to benefits info, tax returns and estate planning documents.

By signing below, I/we understand that my client information can be released as outlined above.

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