



## 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

You:	Spouse:
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Email address

You:	Spouse:
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Home Address

\_\_\_\_\_

Mailing address (if different)

\_\_\_\_\_

Marital Status (circle one)

Single	Married	Divorced	Widowed	Anniversary:
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Do you have children?

Y	N	How many?	Children's age(s):
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### Personal/Financial Details

#### You

#### Spouse

Birth Date

\_\_\_\_\_

Social Security #

\_\_\_\_\_

Driver License # & State

\_\_\_\_\_

DL Issue date & Exp Date

\_\_\_\_\_

US Citizen

Y	N	Y	N
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Retired

Y	N	Y	N
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Social Security Pymt

\$/mo	\$/mo
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Pension Pymt

\$/mo	\$/mo
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Employer Name

\_\_\_\_\_

Job Title or Description

\_\_\_\_\_

Work Phone

\_\_\_\_\_

Employer Address

\_\_\_\_\_

Total Annual Income

\$	\$
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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

Save for Education    Generate Income    Preserve Wealth

Investment Purpose (circle all that apply)      Retirement Purposes    Accumulate Wealth    Market Speculation

Save for Short term Goals

Other: \_\_\_\_\_

Investment Time Horizon in years      <5    5-10    10-20    20+

Investment Knowledge (circle one)      None    Limited    Good    Extensive

Risk Tolerance (circle one)      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: \_\_\_\_\_

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