

Basic Information

Today's Date: _____

Client #1 Name: _____

Birth Date: _____

Address: _____

Phone Number: _____

Preferred Method of Contact: Phone E-mail

Any history of divorce, bankruptcy, or lawsuits? Yes No

If yes, please explain: _____

Client #2 Name: _____

Birth Date: _____

E-mail Address: _____

Date of Marriage (if applicable): _____

Is either of you a non-US citizen? Yes No

Client #1 Employment Information

Employer: _____

Position: _____

Start Date: _____

Base Salary: \$

Bonus/Additional Income: \$

Do you anticipate a significant change in your situation? Yes No

If yes, please explain: _____

Client #2 Employment Information

Employer: _____

Position: _____

Start Date: _____

Base Salary: \$

Bonus/Additional Income: \$

Do you anticipate a significant change in your situation? Yes No

If yes, please explain: _____

Financial Information

ASSETS

Cash/CDs (non-retirement): \$

Investments (non-retirement): \$

Retirement Accounts (total): \$

Primary Home Value: \$

Other Real Estate: \$

Other: \$

DEBTS

Primary Home (total): \$

Other Real Estate (total): \$

Auto: \$

Student: \$

Credit Cards (not paid monthly): \$

Other: \$

Dependents

Name: _____ Age: _____

Name: _____ Age: _____

Name: _____ Age: _____

Name: _____ Age: _____

Financial Goals or Concerns

What financial goals or concerns would you like to address?

- | | | | |
|---------------------|-------------------|-----------------------|-----------------|
| Home Purchase | Education Savings | Retirement Planning | Debt Management |
| Cash Flow/Budgeting | Estate Planning | Investment Management | Other |

Additional Notes/Concerns: _____

How did you hear about us? _____