NIKULSKI FINANCIAL, INC. Because happiness can be planned.

Client Information Sheet

		Perso	nal Information				
Full Name:							
	Last		1	First	M.I.		
Address:							
	Street Address				Apartment/Unit #		
	City			State	ZIP Code		
Preferred Phone (Home/Mobile):			Alt Phone (Home/Mobile):				
Email:							
Preferred Method of Communication:	f	Postcard 🛛	Email 🗖	Text Message 🛛			
Birth Date:			SSN:				
Difti Date.			55IN				
		Spous	al Information				
Full Name:	Last			First	M.I.		
	Lust		1		171.11.		
Address:	Street Address				Apartment/Unit #		
					1 ,		
	City			State	ZIP Code		
Preferred Phone (He	red Phone (Home/Mobile): Alt Phone (Home/Mobile):						
	onne/ wrobite):		Alt Phone (Home/Mobile):				
Email: Preferred Method of	c						
Communication:	L	Postcard 🛛	Email 🗖	Text Message 🛛			
Birth Date:			SSN:				
Wedding Anniversary							
Employment Information							
Self	Employed 🗖 Ui	nemployed 🛛 Retired	□ Spouse	Employed 🗖 Unen	nployed 🗆 Retired 🗆		
Title:			Title:				
			Employer:				
Work Address:			Work Address:				
				2:			

Beneficiary Information						
Full Name:						
	Last	First	<i>M.I.</i>			
	birthdate	SSN	Relationship			
Full Name:	Last	First	<i>M.I.</i>			
	birthdate	SSN	Relationship			
Full Name:	Last	First	M.I.			
	birthdate	SSN	Relationship			
Full Name:	Last	First	<i>M.I.</i>			
	birthdate	SSN	Relationship			