

## Client Information Sheet

### Personal Information

Full Name: \_\_\_\_\_  
*Last* *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:  Postcard  Email  Text Message

Birth Date: \_\_\_\_\_ SSN: \_\_\_\_\_

### Spousal Information

Full Name: \_\_\_\_\_  
*Last* *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:  Postcard  Email  Text Message

Birth Date: \_\_\_\_\_ SSN: \_\_\_\_\_

### Employment Information

**Self**      Employed  Unemployed  Retired       **Spouse**    Employed  Unemployed  Retired

Title: \_\_\_\_\_ Title: \_\_\_\_\_

Employer: \_\_\_\_\_ Employer: \_\_\_\_\_

Work Address: \_\_\_\_\_ Work Address: \_\_\_\_\_

Address: \_\_\_\_\_ Address: \_\_\_\_\_

Work Phone: \_\_\_\_\_ Work Phone: \_\_\_\_\_

## Children Information

Full Name: \_\_\_\_\_  
*Last* *First* *M.I.*

Birth Date: \_\_\_\_\_ SSN: \_\_\_\_\_

Full Name: \_\_\_\_\_  
*Last* *First* *M.I.*

Birth Date: \_\_\_\_\_ SSN: \_\_\_\_\_

Full Name: \_\_\_\_\_  
*Last* *First* *M.I.*

Birth Date: \_\_\_\_\_ SSN: \_\_\_\_\_

Full Name: \_\_\_\_\_  
*Last* *First* *M.I.*

Birth Date: \_\_\_\_\_ SSN: \_\_\_\_\_

Annual Income:  \$0 - 24,999  \$25,000 - 49,999  \$50,000 - 99,999  \$100,000 - 249,999  \$250,000+

Approx. Net Worth  
(not including primary residence):  \$0 - 14,999  \$15,000 - 49,999  \$50,000 - 99,999  \$100,000 - 249,999  
 \$250,000 - 499,999  \$500,000 - 999,999  \$1,000,000 - 1,999,999  \$2,000,000+