



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: _____

Personal Interests:	Cooking Wine Bourbon Hiking Biking Tennis Golf Art
	Sailing Boating Fishing Travel Cruises Cars Cards/Poker Shooting/Guns
	Teams/Sports Followed: _____

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: _____

Wedding Anniversary _____

Personal Interests:	Cooking Wine Bourbon Hiking Biking Tennis Golf Art
	Sailing Boating Fishing Travel Cruises Cars Cards/Poker Shooting/Guns
	Teams/Sports Followed: _____

Employment Information

Self	Employed <input type="checkbox"/> Unemployed <input type="checkbox"/> Retired <input type="checkbox"/>	Spouse	Employed <input type="checkbox"/> Unemployed <input type="checkbox"/> Retired <input type="checkbox"/>
Title: _____		Title: _____	
Employer: _____		Employer: _____	
Work Address: _____		Work Address: _____	
Work Phone: _____		Work Phone: _____	

Children Information

Full Name:	_____	_____	_____
	<i>Last</i>	<i>First</i>	<i>M.I.</i>
Birth Date:	_____	SSN:	_____
Full Name:	_____	_____	_____
	<i>Last</i>	<i>First</i>	<i>M.I.</i>
Birth Date:	_____	SSN:	_____
Full Name:	_____	_____	_____
	<i>Last</i>	<i>First</i>	<i>M.I.</i>
Birth Date:	_____	SSN:	_____
Full Name:	_____	_____	_____
	<i>Last</i>	<i>First</i>	<i>M.I.</i>
Birth Date:	_____	SSN:	_____

Annual Income:	<input type="checkbox"/> \$0 - 24,999 <input type="checkbox"/> \$25,000 – 49,999 <input type="checkbox"/> \$50,000 – 99,999 <input type="checkbox"/> \$100,000 – 249,999 <input type="checkbox"/> \$250,000+
Approx. Net Worth (<i>not including primary residence</i>):	<input type="checkbox"/> \$0 - 14,999 <input type="checkbox"/> \$15,000 – 49,999 <input type="checkbox"/> \$50,000 – 99,999 <input type="checkbox"/> \$100,000 – 249,999 <input type="checkbox"/> \$250,000 – 499,999 <input type="checkbox"/> \$500,000 – 999,999 <input type="checkbox"/> \$1,000,000 – 1,999,999 <input type="checkbox"/> \$2,000,000+
Household Investment Objectives:	<input type="checkbox"/> Conservative Income <input type="checkbox"/> Income <input type="checkbox"/> Balanced <input type="checkbox"/> Growth <input type="checkbox"/> Aggressive Growth
Investment Experience:	<input type="checkbox"/> Experienced <input type="checkbox"/> Moderately Experienced <input type="checkbox"/> Moderately Inexperienced <input type="checkbox"/> Inexperienced
Financial Interests:	<input type="checkbox"/> Municipal Bonds <input type="checkbox"/> Fixed Income <input type="checkbox"/> Energy <input type="checkbox"/> Technology <input type="checkbox"/> Retirement <input type="checkbox"/> College Planning

I hereby certify that the above statements are true and correct to the best of my knowledge.

_____	_____	_____/_____/_____
Initial	Initial	Date