SYVERSON STREGE

# BASIC DATA FORM

## PERSONAL DATA

| | | |
|---|---|---|
| Full Name | Date of Birth | SS# |
| Spouse's Full Name | Date of Birth | SS# |
| Cell # | Spouse's Cell # | Home Phone # |
| Address | | |
| City | State | Zip |
| Email Address | Spouse's Email | |

## CHILDREN, DEPENDENTS, AND OTHER RELATIVES

| | | |
|---|---|---|
| Name | Relationship | Date of Birth |
| Name | Relationship | Date of Birth |
| Name | Relationship | Date of Birth |
| Name | Relationship | Date of Birth |

## EMPLOYMENT DATA

| | |
|---|---|
| Occupation Title | Employer Name |
| Spouse's Occupation Title | Employer Name |

## INCOME SOURCES

| | | |
|---|---|---|
| Primary Income | Base Salary | Estimated Bonus |
| Spouse's Primary Income | Base Salary | Estimated Bonus |

## OTHER INCOME

| | |
|---|---|
| Source | Amount |
| Source | Amount |

## AREA(S) OF INTEREST

- ☐ Comprehensive Financial Planning
- ☐ Investment Planning
- ☐ Retirement Planning
- ☐ Tax Planning
- ☐ Estate Planning
- ☐ Philanthropic Planning
- ☐ Business Succession Planning
- ☐ Insurance Planning (Risk Management)
- ☐ Other _____

Have you executed any of the following estate documents?

☐ Will ☐ Revocable Living Trust ☐ General Power of Attorney ☐ Medical Power of Attorney

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**Please provide us with a copy of your financial statement or complete the following:**

| ASSETS | VALUE | COMMENTS |
|---|---|---|
| RESIDENCE | | |
| VEHICLES | | |
| CASH ACCOUNTS | | |
| TAXABLE INVESTMENT ACCOUNTS | | |
| INVESTMENT REAL ESTATE | | |
| BUSINESS INTERESTS | | |
| PENSION | | |
| RETIREMENT PLANS | | |
| IRA | | |
| ROTH IRA | | |
| OTHER ASSETS | | |

| LIABILITES | AMOUNT | COMMENTS |
|---|---|---|
| MORTAGE | | |
| HOME EQUITY LOANS | | |
| CREDIT CARDS OR OTHER DEBTS | | |

| INSURANCE | AMOUNT | COMMENT |
|---|---|---|
| LIFE INSURANCE | | |
| LONG-TERM CARE INSURANCE | | |

SEE OTHER SIDE