

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

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
MORTGAGE		
HOME EQUITY LOANS		
CREDIT CARDS OR OTHER DEBTS		

INSURANCE	AMOUNT	COMMENT
LIFE INSURANCE		
LONG-TERM CARE INSURANCE		

SEE OTHER SIDE

