

# CONFIDENTIAL CLIENT PROFILE

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COMPANY NAME	COMPLETED BY	DATE

## BASIC INFORMATION

CLIENT A	PREFERRED CONTACT METHOD	BEST TIME TO CONTACT
OCCUPATION		
ADDRESS		
WORK PHONE	HOME PHONE	CELL PHONE
FAX	EMAIL ADDRESS	

CLIENT B	PREFERRED CONTACT METHOD	BEST TIME TO CONTACT
OCCUPATION		
ADDRESS		
WORK PHONE	HOME PHONE	CELL PHONE
FAX	EMAIL ADDRESS	

## FAMILY INFORMATION

NAME	AGE	# OF CHILDREN	COMMENTS

## ADVISORS

ROLE	NAME	FIRM NAME	PHONE
Attorney			
Accountant			

## ASSETS

DESCRIPTIONS	A	JOINT	OTHER
Cash			
Taxable Accounts			
IRAs			
Qualified Plans (401k, Pension)			
Non-Qualified Plans (Deferred Compensation)			
Primary Residence			
Other Real Estate			
Annuities			
Business Interests			
Marital Trusts			
Personal Property (Autos, Jewelry, etc.)			
Other (Beneficiary of GST Trust)			
Other			
<b>TOTAL ASSETS</b>			

## LIABILITIES

LOAN	TITLE (A/B/JT)	OUTSTANDING BALANCE	INTEREST	INSTITUTION
Mortgage				
Home Equity				
Personal Debt				

## LIFE INSURANCE

TYPE	ISSUER	INSURED (A/B/JT)	DEATH BENEFIT	CASH VALUE	BENEFICIARY
<b>TOTAL INSURANCE</b>					

## SUMMARY

	A	B	JOINT	OTHER
Assets				
Liabilities				
Life Insurance				
<b>TOTAL NET WORTH</b>				

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