PRINT CLEAR

PARTNERS IN FINANCIAL PLANNING

All information provided will remain strictly confidential.

PERSONAL INFORMATION DATA SHEET

CLIENT FULL LEGAL NAME	**CO-CLIENT FULL LEGAL NAME**
First **Middle** **Last** ________________________________	**First** **Middle** **Last** ________________________________
Nickname ______________________	**Nickname** ______________________
Birth-date_____-_____-_______(MM-DD-YYYY)	Birth-date_____-_____-_______(MM-DD-YYYY)
SSN_______-______- _______	SSN_______-______- _______
Citizenship O US Citizen O Non US Citizen	Citizenship O US Citizen O Non US Citizen

Please Check One: ☐ Married_____-_____-_______(MM-DD-YYYY) ☐ Single

☐ Divorced ☐ Other ______________________

Street Address______________________ City______________________ State Zip __________

Mailing Address (if different) ______________________ City______________________ State Zip __________

Home Phone (______)______________________

CLIENT	**CO-CLIENT**
Driver's License No.______________ State ______	Driver's License No. ______________ State ______
Issue Date ________ Expiration Date ________	Issue Date ________ Expiration Date ________
Cell Phone ( ) ______________________	Cell Phone ( ) ______________________
Work Phone ( ) ______________________	Work Phone ( ) ______________________
Preferred Email ______________________	Preferred Email ______________________
OCCUPATION	**OCCUPATION**
Title ______________________	Title ______________________
Employer ______________________	Employer ______________________

CHILDREN / DEPENDENTS

Name	Birth-date (MM-DD-YYYY)	SSN	Marital Status	No. of Kids
1. ______________________	_____-_____-_______	_______-______-_______	_____	_____
2. ______________________	_____-_____-_______	_______-______-_______	_____	_____
3. ______________________	_____-_____-_______	_______-______-_______	_____	_____
4. ______________________	_____-_____-_______	_______-______-_______	_____	_____
5. ______________________	_____-_____-_______	_______-______-_______	_____	_____

REAL ESTATE Address	Market Value		Current Balance	Initial Balance	Rate	Fixed/Variable	Term	Start Date
1.	$	1st Mortgage	$	$	%	Fixed	Yrs	
		2nd Mortgage	$	$	%	Fixed	Yrs	
2.	$	1st Mortgage	$	$	%	Fixed	Yrs	
		2nd Mortgage	$	$	%	Fixed	Yrs	
3.	$	1st Mortgage	$	$	%	Fixed	Yrs	
		2nd Mortgage	$	$	%	Fixed	Yrs	

ADDITIONAL INFORMATION

Primary Issues & Concerns

Describe the top three goals, issues or concerns you most want to have addressed.

We require you to provide the latest statements for the below items. You can upload these to Sharefile or deliver them to our office. We will scan these and provide them back to you.

Document Checklist

Cash Flow

☐Budget (if available)

☐Paystub (if available)

Investments and Assets

☐Most recent statements for any investment account.

- Taxable Brokerage, 401(k)/403(b), 529 Plans, Deferred Compensation Plans, Stock Options, IRAs, Roth IRAs, annuities etc..

☐Balances of any savings, checking, money market and CDs

☐Investment options available within your employer retirement plan

☐Social Security Statements (if applicable)

Debt

☐Most recent debt statements to include interest rate and monthly payment amount.

- Ex: Mortgage, Equity Line, Credit Card, Student Loan, Car Loan, etc.

Insurance

☐Most recent statement for any whole/universal/variable life policies.
☐Details on any term life to include term, amount and when purchased.
☐Details on any group life coverage.
☐Health plan details and any plans available to you at your next open enrollment.
☐Disability coverage information.
☐Declaration pages of your home, renters, auto and umbrella policies.

Estate Documents

☐ Will, Advance Medical Directive, Power of Attorney
☐ Trusts

Taxes

☐ Previous year's tax return.

Other

☐ Any other statements or information you feel is important for us to have.

Income

Income Source (Salary, Alimony, Rental, etc..)	**Yearly Gross Amount**	**Earner**	**Comments**
Salary	$	Client	
Salary	$	Client	
Salary	$	Client	
Salary	$	Client	

Any other comments