



Financial Planning for Your Values and Your Future

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## Client Data Sheet

Today's Date: \_\_\_\_\_

Client Name:		SSN:	Birth Date:
Mailing Address:			
Physical Address (if different than mailing):			
Home Phone:		Cell Phone:	
E-mail Address:		Bank Name/City/State:	
Country of Citizenship:	Tax rate: 10 / 15 / 25 / 28 / 33 / 35		# Dependents:
Drivers License #:	State of Issue:	Issue Date:	Expire Date:
Employer:		Type of Business:	
Work Address:			
Work Phone:	Occupation:		Years Employed:
Years of Investment Experience:	Annual Income:	Net worth (w/o house):	
Are you, or any relative of yours, employed by a securities broker/dealer, the NASD, or member of stock exchange? Y / N			

Spouse Name:		SSN:	Birth Date:
Country of Citizenship	Tax rate: 10 / 15 / 25 / 28 / 33 / 35		# Dependents:
Cell Phone:		E-mail Address:	
Drivers License #:	State of Issue:	Issue Date:	Expire Date:
Employer:		Type of Business:	
Work Address:			
Work Phone:	Occupation:		Years Employed:
Years of Investment Experience:	Annual Income:	Net worth (w/o house):	
Are you, or any relative of yours, employed by a securities broker/dealer, the NASD, or member of stock exchange? Y / N			

Beneficiaries (P= Primary / C= Contingent)	Birthdate	SSN	Address	Relationship

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