

Confidential Client Profile

Complete and Return to Your Referring Agent or Advisor

DATE Submitted:

Name:		Spouse:	
Date of Birth:		Date of Birth:	
Best Contact Telephone #:		Best Contact Telephone #:	
Email Address:		Email Address:	
Home Address:	City:	State:	Zip:
Own or Rent:			

INCOME INFORMATION:

Gross Income (Yearly): _____	Spouse Gross Income (Yearly): _____
Net Income Per Pay Check:	Net Income Per Pay Check:
How often do you get paid?	How often do you get paid?
Next pay date:	Next pay date:
Other Income (Who, how often, when?):	Other Income (Who, how often, when?):

Employment Information

Employer: _____	Employer (Spouse): _____
Position: _____	Position: _____
Phone #: _____	Phone #: _____
How long employed: _____	How long employed: _____

Are you a business owner? If so, what is the name of your business? _____

Expected Yearly Retirement Income:

Retirement age: _____	Retirement age: _____
Social Security Income: _____	Social Security Income: _____
Pension Income: _____	Pension Income: _____
Income Required for a Comfortable Retirement: _____	

CURRENT MORTGAGE INFORMATION: (Primary Home)

Name of Lender:	Type Loan:
Home Value:	Purchase Price:
Current Term:	Start Date (Month/Year):
Current Mortgage Initial Loan Amount:	Current Balance:
Interest Rate:	Fixed or Variable:
Total Monthly Mortgage Payment (including escrows):	Date mortgage is paid :
Use this section for Home Equity Lines or Fixed 2nd Mortgages – Note: For HELOC, include Line Amount	
2nd Mortgage Lender:	Fixed or Variable:
Original Term:	Starting Date (Month/Year):
Original Balance/Line Amount:	Current Balance:

Interest Rate:	Payment:	Date paid:
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LIABILITIES: (Credit Cards, Auto, Education, Boat and Home Equity Loans, etc.)

<i>TYPE OF ACCT.</i>	<i>COMPANY</i>	<i>START DATE (Month/Year)</i>	<i>STARTING BAL.</i>	<i>CURRENT BAL.</i>	<i>MIN. PAYMENT</i>	<i>INTEREST RATE</i>	<i>TERM</i>	<i>DATE PAID</i>

NON-QUALIFIED ASSETS: (Savings, Checking, Money Market, CDs, Bonds, Stocks & Mutual Funds)

Type	Company	Current Balance	Annual Contribution	Rate of Return	Owner

QUALIFIED ASSETS: (IRAs, Roth IRA, 401K, 403B, TSP etc.)

Type	Company	Current Balance	Annual Contribution	Rate of Return	Owner

LIFE INSURANCE:

Type	Company	Current Balance	Annual Contribution	Rate of Return	Owner