

# SERVICE ALL ABOUT YOU

This form is to help us better serve you during and after the process. Thank you for your cooperation in filling out this information.

Name \_\_\_\_\_  
Date of Birth \_\_\_\_\_  
Email Address \_\_\_\_\_  
Spouse's Name \_\_\_\_\_  
Date of Birth \_\_\_\_\_  
Email Address \_\_\_\_\_

Are you on Facebook? Yes \_\_\_\_\_ No \_\_\_\_\_

Names of children living at home and date of birth

- 1) \_\_\_\_\_ / /
- 2) \_\_\_\_\_ / /
- 3) \_\_\_\_\_ / /

We communicate often with our clients to reduce this stressful process.

Please tell us how we can best communicate with you.

Are you available to talk at work? Yes / No If yes, your number \_\_\_\_\_ ext \_\_\_\_\_

What is the best number to reach you on Thursdays for your update call? \_\_\_\_\_ Alternate number \_\_\_\_\_

## More About You – The Fun Part

My Our Favorite Restaurant is \_\_\_\_\_  
My favorite hobby(ies) is \_\_\_\_\_  
My dream vacation is \_\_\_\_\_  
My pet is a dog / cat / other \_\_\_\_\_ named \_\_\_\_\_  
My best friend is \_\_\_\_\_  
My favorite movie \_\_\_\_\_

## More About You – The Business Part

Do you have a financial planner? Yes / No If yes, who? \_\_\_\_\_  
Do you have a will/trust completed? Yes / No \_\_\_\_\_  
Do you have an insurance professional? Yes / No If yes, who? \_\_\_\_\_  
Do you have a CPA? Yes / No If yes, who? \_\_\_\_\_  
Do you have any other professional assisting you with your money? \_\_\_\_\_  
If yes, who? \_\_\_\_\_  
Do you do a budget monthly? Yes / No If yes...describe \_\_\_\_\_

Are there any other professionals or services we can assist you with? Yes / No \_\_\_\_\_  
If yes, how, can we help? \_\_\_\_\_

