Basic Client Information Summary

This form can be used as a quick reference to essential client information. The planner should complete a basic client information summary form for each client and file them in a readily accessible location. This form is particularly helpful when handling day-to-day client matters.

Client's Last Name: ______________________________
Office Telephone: ______________________________
Home Telephone: ______________________________
Other Telephone: **Location** **Number**

Location	Number

Client's Full Name:____________________________
Date of Birth:___________ **SS#:** _____-____-______
Spouse's Full Name:___________________________
Date of Birth:___________ **SS#:** _____-____-______

Home Address:
____
____
____

Employment Information:

CLIENT
Occupation: ______________________________
Title: ______________________________
Employer: ______________________________
Address: ______________________________

Employment Information:

SPOUSE:
Occupation: ______________________________
Title: ______________________________
Employer: ______________________________
Address: ______________________________

Correspondence Sent To: ________ **Home**
________ **Client's Office**
________ **Spouse's Office**

Approximate Gross Income:
$______________**(for year ended**_______**)**
Approximate Net Worth:
$______________**(as of**__________**)**

Children's Name:	DOB	SS#	Phone	Residence

Advisors:	Name:	Telephone:	Firm Name:	Address:
Attorney				
Accountant				
Insurance Agent				
Banker				
Investment Advisor				
Stockbroker				
Other____________				