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**
	_____	_____
	_____	_____
	_____	_____

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_____	_____	_____	_____	_____