**Client Profile Template**

**CLIENT NAME:**

**FAMILY**

**Spouse** [Name, Anniversary date, etc.]

**Children** [Names, Ages, Interests & Accomplishments]

**Grandchildren** [Names, Ages, Interests & Accomplishments]

**Pets** [What types, How many, Names & Ages]

**Health Issues** [For client, spouse, or anyone in their immediate family]

**Other Important Family Information** [Specify]

**BUSINESS & CAREER**

**Current and/or Former Occupation** [Client & Spouse, How long & Where]

**Business Owner** [Type of business, Family involvement, Succession Planning/Retirement]

**Retirement** [Are they retired and if not, when do they plan on retiring]

**Education and/or Credentials** [Client & Spouse, Designations, Degrees, Alumni]

**Professional Accomplishments and/or Acknowledgements** [Client & spouse]

**INTERESTS & RECREATION**

**Personal Interests** [Hobbies, Interest, Passions]

**Travel** [Seasonal or other, Predictable, Favorite places to visit]

**Cottage, Vacation Home, Boat & Time Share** [Any travel related to these]

**Clubs & Professional Organizations** [Volunteer, Support or Board Member]

**Charities & Worthy Causes** [Volunteer, Support or Board Member]

**Sports & Recreation** [What do they Play, Coach, Watch]

**Music** [What do they Play, Listen, Enjoy Live]

**Reading** [Favorite types of Books, Authors, Topics, Genres]

**Other Personal Interests** [Specify]

**WEALTH**

The area of comprehensive wealth management is covered later on in this program but will focus on the following:

Wealth Planning Goals & Objectives

Cash Flow Planning

Investment Strategies

Tax Planning

Retirement Planning

Caring for Others

Family Security

Estate Planning