Client Profile Guidelines

Here is the type of information that will help you create and deliver high levels personalized service to your high value clients.

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]
- Alumni of (Universities, associations)

Wealth

- You need to know everything about their personal financial situation and future goals to provide comprehensive wealth management.