



## FINANCIAL PLANNER CLIENT INTAKE FORM

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### CLIENT INFORMATION

Name: \_\_\_\_\_ U.S. Citizen:  Yes  No  
Date of Birth: \_\_\_\_\_ Social Security Number: \_\_\_\_\_  
Street Address: \_\_\_\_\_  
City: \_\_\_\_\_ State: \_\_\_\_\_ ZIP Code: \_\_\_\_\_  
Years Living in Current Home: \_\_\_\_\_ Do you plan on moving?  Yes  No  
Home Phone: \_\_\_\_\_ Mobile Phone: \_\_\_\_\_  
E-Mail: \_\_\_\_\_ Fax: \_\_\_\_\_  
Preferred Method of Contact:  Home Phone  Mobile Phone  E-Mail  Fax  
Marital Status:  Single  Married  Widowed  Divorced  
• If married, answer the following:  
○ How many years have you been married? \_\_\_\_\_  
○ Is this your first marriage?  Yes  No

### SPOUSE INFORMATION

Name: \_\_\_\_\_ U.S. Citizen:  Yes  No  
Date of Birth: \_\_\_\_\_ Social Security Number: \_\_\_\_\_  
Mobile Phone: \_\_\_\_\_ E-Mail: \_\_\_\_\_  
Is this your spouse's first marriage?  Yes  No  
If your spouse resides at a different address, provide the following:  
Street Address: \_\_\_\_\_  
City: \_\_\_\_\_ State: \_\_\_\_\_ ZIP Code: \_\_\_\_\_  
Home Phone: \_\_\_\_\_

# The New Financial Planner A Guide To Client Service

**Xiaolong Qi**



**The New Financial Planner A Guide To Client Service:**

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<https://ftp.thebrandexperience.com/book/Resources/Documents/manual%20self%20help.pdf>

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