Advizr Client Profile

Personal Information

	Client	Co-Client
Name		
Gender	◉ Male ◯ Female	◯ Male ◯ Female
Year of Birth		

Children

Name	Year of Birth
1.	
2.	
3.	
4.	

Goals

Retirement

	Retirement Age		Retirement Age
Client		Co-Client	

	Annual Dollar Amount
Retirement Expense	

Education

Student Name	Cost	Start Year
1.		
2.		
3.		
4.		

Other Goals (Travel, Large Purchase, etc.)

Description	Cost	Start Year	Number of Years
1.			
2.			
3.			

Accounts

Bank Accounts/ Investment Accounts/Individual Retirement Accounts

Description	Account Type	Owner	Value	Annual Savings
1.				
2.				
3				
4.				
5.				

Employer Sponsored Retirement Plans

Description	Type	Owner	Value	Annual Savings	Employer Match
1.					
2.					
3.					

Liabilities (Mortgage, Credit Cards, Car Loans, Student Loans, Personal Loans, etc.)

Description	Loan Type	Balance	Interest Rate	Monthly Payment	Origination Date
1.					
2.					
3.					
4.					
5.					

Insurance Policies

Description	Type	Owner	Benefit
1.			
2.			
3.			

Other Assets **(Personal Home, Business, Car, etc.)**

Description	Value
1.	
2.	
3.	
4.	
5.	

Income

Employment Income

Description	Earner	Salary
1.		
2.		
3.		

Social Security

Client Name		Co-Client Name	
Monthly PIA		Monthly PIA	
Age to Begin		Age to Begin	

Other Income (Pension, Rental Property Income, Annuity Income, etc.)

Description	Earner	Annual Amount	Year it Begins	Year it Ends
1.				
2.				
3.				

Taxes

Filing Status:

◯ Individual
◯ Married, Filing Jointly
◯ Head of Household
◯ Married, Filing Separately

State of Residence

Expenses

Monthly Household Expenses

\- or -

Annual Household Expenses

Feel free to add additional information on the back of this page

Member of The Financial Life Planning Institute

Certified Financial Educator with the Heartland Institute of Financial Education

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Roger S. Desai, Representative.

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CUSTOMER PRIVACY INFORMATION

FORM ADV PART II