



## IT'S ALL ABOUT YOU!!

This form is to help us better serve you. Thank you for your cooperation in filling out this info.

Name: \_\_\_\_\_

Spouse's Name: \_\_\_\_\_

Date of Birth (DOB): \_\_\_\_\_

Spouse's DOB: \_\_\_\_\_

### Names of children living at home and date(s) of birth:

Name: \_\_\_\_\_

Name: \_\_\_\_\_

Date of Birth: \_\_\_\_\_

Date of Birth: \_\_\_\_\_

Name: \_\_\_\_\_

Name: \_\_\_\_\_

Date of Birth: \_\_\_\_\_

Date of Birth: \_\_\_\_\_

### More About You (the fun stuff!)

My Favorite Restaurant: \_\_\_\_\_

My Spouse's Favorite Restaurant: \_\_\_\_\_

My Favorite Hobby(s): \_\_\_\_\_

My Spouse's Favorite Hobby(s): \_\_\_\_\_

My Favorite Sports Teams: \_\_\_\_\_

My Spouse's Favorite Teams: \_\_\_\_\_

### More About You (the boring stuff)

Do you have a Financial Planner?    \_\_ Yes \_\_ No

Your Rating for this Pro: \_\_\_\_\_

Do you have a Will completed?    \_\_ Yes \_\_ No

Do you have a Trust?    \_\_ Yes \_\_ No

Do you have a Preferred Realtor?    \_\_ Yes \_\_ No

Your Rating for this Pro: \_\_\_\_\_

Do you have a Tax Preparer?    \_\_ Yes \_\_ No

Your Rating for this Pro: \_\_\_\_\_

Do you Operate on a Budget?    \_\_ Yes \_\_ No

Budget Effectiveness: \_\_\_\_\_