

# Confidential Personal and Financial Profile

At Legacy Consulting Group, personal financial life planning is just that...personal. No two clients' objectives and resources are the same; therefore, please take a few minutes to acquaint us with your personal situation.

## ***Personal Information:***

Today's Date: \_\_\_\_\_

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

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

Home Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Home Phone: (    ) \_\_\_\_\_ Office Phone: (    ) \_\_\_\_\_

Cell Phone: (    ) \_\_\_\_\_ E-Mail Address: \_\_\_\_\_

Occupation: \_\_\_\_\_ Employer: \_\_\_\_\_

## ***Spouse's Information:***

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

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

Home Phone: (    ) \_\_\_\_\_ Office Phone: (    ) \_\_\_\_\_

Cell Phone: (    ) \_\_\_\_\_ E-Mail Address: \_\_\_\_\_

Occupation: \_\_\_\_\_ Employer: \_\_\_\_\_

## ***Children's Names and Dates of Birth:***

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

## ***Financial Data:***

My/our annual income is approximately: \_\_\_\_\_

My/our net worth is approximately: \_\_\_\_\_

## ***Current Advisors and Firm/Company:***

CPA: \_\_\_\_\_

Attorney: \_\_\_\_\_

Financial Planner: \_\_\_\_\_

Broker: \_\_\_\_\_