



Client Profile Fact Finder

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Client Information:

Client Name: _____ Male / Female DOB: _____

Cell: _____ Email: _____

Occupation: _____ Name of Employer: _____

Gross Income: \$ _____ Paycheck Frequency: 2x a month / every other week / monthly

Spouse/Partner: _____ Male / Female DOB: _____

Cell: _____ Email: _____

Occupation: _____ Name of Employer: _____

Gross Income: \$ _____ Paycheck Frequency: 2x a month / every other week / monthly

Child 1: _____ Male / Female DOB: _____

Child 2: _____ Male / Female DOB: _____

Child 3: _____ Male / Female DOB: _____

Child 4: _____ Male / Female DOB: _____

Do you own a business? Yes / No

Name of Business: _____ Industry: _____

If yes, what is your structure? Sole Prop / C-Corp / S-Corp / LLC / Partnership



Home Expenses:

Rent: \$ _____

Utilities/Phone/Cable/Internet/Etc.: \$ _____

Transportation Expenses:

Vehicle Payments: \$ _____

Fuel: \$ _____

Maintenance: \$ _____

Insurance Expenses:

Life: \$ _____

Disability: \$ _____

Health: \$ _____

Home: \$ _____

Auto: \$ _____

Daily Expenses:

Food: \$ _____

Entertainment: \$ _____

Kids Activities: \$ _____

Other: \$ _____

Mortgages

Lender Name	Mortgage Start Date	Mortgage Term	Monthly Payment*	Extra Principal Payment	Interest Rate	Escrow Payment	Mortgage Insurance Payment	Current Mortgage Balance	Original Mortgage Amount

**Including Principal, Interest, Escrows, PMI/Mortgage Insurance etc.*

Loans

Account Name*	Loan Start Date	Loan Term	Monthly Payment	Extra Principal Payment	Interest Rate	Current Loan Balance	Original Loan Amount

**Auto Loans, Student Loans, Personal Loans, Business Loans*

Revolving Credit

Type of Credit*	Current Balance	Minimum Payment	Extra Principal Payment	Interest Rate	Credit Limit

**LOC- Line of Credit, Credit Card, HELOC – Home Equity Line of Credit*



Rental Property # _____

Purchase Price \$ _____ Purchase Date: _____
Loan Balance \$ _____ _____ % _____ Yrs
Market Value (MV) \$ _____ MV as of _____
Rent \$ _____
Expenses \$ _____
Cash Flow \$ _____

Address: _____

City: _____ State: _____ Zip: _____

Name Titled Under: _____

Rental Property # _____

Purchase Price \$ _____ Purchase Date: _____
Loan Balance \$ _____ _____ % _____ Yrs
Market Value (MV) \$ _____ MV as of _____
Rent \$ _____
Expenses \$ _____
Cash Flow \$ _____

Address: _____

City: _____ State: _____ Zip: _____

Name Titled Under: _____



Personal Statements:

- Estimated Balances
 - Checking 1 \$ _____
 - Checking 2 \$ _____
 - Savings 1 \$ _____
 - Savings 2 \$ _____
 - Other 1 \$ _____
 - Other 2 \$ _____

- Last Paystub
- Last Mortgage Statement(s)
- Last 401(k) Statement(s)
- Last IRA Statement(s)
- Last Brokerage/Investment/529 Plan Statement(s)
- Life Insurance Policy(ies) or Annual Statement
- Last Annuity Statement(s)
- Social Security Statement(s)
- Last Filed Tax Return
- Trust/Will Document

Business Statements:

- 2019 & YTD Balance Sheet
- 2019 & YTD Profit/Loss Statement
- Last 3 yrs filed tax returns Personal and Business