

# Keith Buchanan Wealth Planning Group

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Review Date: \_\_\_\_\_

Client Datasheet			
<b>Client</b>		<b>Spouse</b>	
<b>Nickname</b> _____			<b>Nickname</b> _____
Full Name _____			Full Name _____
DOB _____ / ____ / ____ Age: _____			DOB _____ / ____ / ____ Age: _____
SSN _____	Shirt Size: _____		
SSN _____			Shirt Size: _____
<b>ID Type</b> _____ No: _____			<b>ID Type</b> _____ No: _____
Issue: _____ / ____ / ____	Exp: _____ / ____ / ____	St: _____	Issue: _____ / ____ / ____ Exp: _____ / ____ / ____ St: _____
Home _____	Cell _____		
Work _____	Fax _____		
E-mail _____			E-mail _____
Unique Info _____			Wedding Anniversary _____ / ____ / ____
Mail To			
<b>Prim Addr</b> _____		<b>Sec Addr</b> _____	
City _____ St/Zip: _____		City _____ St/Zip: _____	
		Reference _____	
<b>Client Work</b>		<b>Spouse Work</b>	
Retired? _____	Retire Date: _____ / ____ / ____	Retired? _____	Retire Date: _____ / ____ / ____
<b>Employer</b> _____			<b>Employer</b> _____
Position _____	Mo. _____	Yr. _____	Position _____ Mo. _____ Yr. _____
Niche _____	Industry: _____		
Niche _____			Industry: _____
Address _____			Address _____
City _____	St/Zip: _____		
City _____			St/Zip: _____
Prev. Employer _____	Retired _____		
Prev. Employer _____			Retired _____
(Client)		(Spouse)	
Health Issues			
Hobbies			
Income		Estate Planning - POA, Will, Trust	
(Client) (Spouse)		Type	Title Revised
Gross Stry + Bonus			
Net Self-Emplymt			
Pension			
Social Security			
IRA			
Other			
Personal Assets (Current Market Value)			
<b>Prim Residence</b> \$ _____	<b>Sec Residence</b> \$ _____	<b>Notes</b>	
Mortgage Balance \$ _____	Mortgage Balance \$ _____		
Mortgage Type F / V \$ _____	Mortgage Type F / V \$ _____		
Mortgage Rate _____	Mortgage Rate _____		
Remaining Pymnts _____ months	Remaining Pymnts _____ months		
<b>Hm Equity Loan</b> \$ _____			
Cars - Mo. Pymnt \$ _____	Rent - Mo. Pymnt \$ _____		
Unsec.Prsnal Debt \$ _____	Other Loans \$ _____		
Client Inheritance \$ _____			
Spouse Inheritance \$ _____			
Cash and Cash Equivalents		Additional Contacts - Attorney/CPA	
Cash & Equivalents \$ _____			Name Phone
CDs Treasury, Bonds \$ _____			

