



MEMBER PROFILE

Date: _____

What brought you by our office today? _____

Please tell me about yourself:

Name: _____ Member # _____

E-Mail Address: _____

Phone: _____ Best time to contact you: _____

Dependants Ages: _____

Employer Name: _____ Occupation: _____

Monthly Income: Job: _____ Pension: _____ Social Security: _____ Other: _____

WHAT ARE YOUR FINANCIAL GOALS?

Short Term:

- Purchase a Home
- Consolidate Debt
- Purchase a Car
- Travel/Vacation
- Emergency Savings
- Other _____

What financial products are you using to reach those goals? (Please note estimated balances and where)

Checking _____ Money Market _____ Savings _____

CD's _____ Other _____ Other _____

Other _____ Other _____ Other _____

Long Term:

- Save for Retirement
- Save for College
- Increase Monthly Income
- Other _____
- Other _____

What are your current long-term accounts? (Please note estimated balances and where)

Mutual Funds _____ Stocks _____ Bonds _____

Annuities _____ 401K _____ Other _____

Anticipated # of Deposits Per Month: _____ Source of Deposits: _____

Anticipated # of Wires Per Month: _____ Domestic International

Recommendations: _____

Is there someone I can thank for referring you to us? _____

Who do you know that could benefit from my service? _____

Other Information: _____