WEINGARTEN ASSOCIATES LLC

Client Information Sheet

	Client	Co-Client
Full Legal Name		
Preferred Name		
Street Address		
City, State, Zip		
Home Telephone		
Work Telephone		
Mobile Telephone		
Fax Number		
Primary E-Mail Address		
Date of Birth		
US Citizen? (circle one)	Yes/No	Yes/No
Date of Marriage		
Previous Marriage? (circle one)	Yes/No	Yes/No
Employer		
Occupation		
Hobbies/special interests		

Children/Other Dependents

Name	Date of Birth	Sex	State of Residency	**Current Grade** (if applicable)

Additional Questions

Please describe your main reason for contacting a financial planner:

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What are your expectations of a financial planner?

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Financial Information

Please provide your **best estimates** for the information requested. If married, **include** your spouses' accounts as well. More detailed information on your accounts will be requested after we begin working together.

Assets	Estimated Value	As of this date:
All 401k accounts		
All other qualified retirement plan accounts		
All IRA accounts (including Roth IRAs, SEPs, etc…)		
All taxable accounts (include brokerage and mutual funds accounts, along with CDs and savings bonds)		
All children's accounts (minors only)		
All cash accounts (checking, savings, money markets, etc…)		
Value of your personal residence		
Value of all other real estate holdings (if applicable)		
Value of any other investments not listed here		
Total:		**N/A**

Please list all of your liabilities below:

Liabilities	**Estimated Value**	**As of this date:**
Primary Mortgage		
Secondary Mortgage (Home Equity Loan or Line of Credit)		
Auto Loans		
Educational Loans		
Credit Card Debt		
Other Debts		
Totals:		**N/A**

In the next section, please provide information regarding your estimated total household income:

	Total Household Income
Previous Calendar Year	
Current Calendar Year	
Next Calendar Year	

If there is anything else you would like to share before our initial meeting, please use the space below:
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Thank you for completing this short organizer. **Please return this document to us no later than one week prior to our appointment.** In accordance with our privacy notice, all information will be kept strictly confidential. We look forward to meeting you.