

It's All About YOU!



I believe in long-lasting mutual beneficial relationships! Will you help me take great care of you by completing our VIP client All About You form? Thank you!

Name: _____ Spouse/Partner _____

What is your job title? _____

What do you love most about your job? _____

What do you find most challenging about your job? _____

If you had a day off, what would you do? _____

If you won a million dollars, how would you spend it? _____

What is your home mailing address? _____

What is your VENMO? _____

More About You – (The fun stuff)

Your B-day: _____ Spouse's B-day: _____ Wedding Anniv.: _____

children living with you:

their birthday:

Pets (type) + Name(s): _____

Would your friend say you are: straight to the point outgoing steady/dependable cautious/accurate

Fav. restaurant? _____ Spouse/Co: _____

Fav. Adult beverage? _____ Spouse/Co: _____

Favorite college/pro sports team? _____

Fav. dessert? _____ Spouse/Co: _____

Fav. candy/snack _____ Spouse/Co: _____

Fav. Store _____ Spouse/Co: _____

More About You – (The boring stuff... but makes you wealth)

Are you interested in receiving information on personal finance, wealth building, and/or personal growth?

Yes No What interests you the most? _____