DATE_____ **NEW CLIENT QUICKFACTS AND ONBOARDING**

NAME	DOB/Age	Name	DOB/Age	
Occupation		Occupation		
Child	DOB/Age	Child	DOB/Age	Grand children
3 YR Goals?	DOB/Age	Child	DOB/Age	

AUTO	Liab 10/20 - 25/50 - 50/100 - 100/300 - 250/500 TITLE Comp _____Coll _____ UM _____same bi Rental ERS Current $
HOME/RENT	Liab 100 or 300 ded 1000 2500 hurr 2% 5% WindMit _____ Rental Prop? Renter Content_____ Current $_____ Video Content Y N NEED TO AOR? - Y N
PAP / FLOOD	PAP- Jewlery - Art - Computer === Flood - Current $ NEED TO AOR? - Y N
PLUP	Liab 1m 2m 3m UM 1m 2m 3m Rental 1 2 3 4 5+ watercraft RV Youthful NONE Current $
DI /LTC	Group 40% 60% Wages AND BONUS? Long term DI Y - N SHORT TERM DI Y - N Current $
Health	Group or Individual (small business group?) Happy with coverage? Current $
Legal	Will, Living Will, Power of Attorney, Health Care Power of Attorney, Trust, ILIT, Bene Review none Update date_____ Attorney name_____
Life	Group Only? Y N - TERM - UL - WL DB_____DB_____ Current$_____HLV <30=30,31-35=25, 36-40X20, 41-55=15, 56-69=10 NEED DOCS? Y N

ASSETS		**LIABILITIES**	
Personal Prop.		**Short Term CC**	$$_____Rate_____Min PMT_____
Jewelry Art Collection Guns		**Short Term Car**	GAP? Y N RATE _____ PMT_____
Savings	Adding $	Need Docs? Y N	
Emergency Fund? 3mo 6mo		**Short Term ST LN**	
Investments	Adding $	**Tax (IRA/401k)**	Tax Bracket
NEED DOCS? Y N			
401k or IRA	Adding $	**Mortgage**	15/30 YR RATE_____ PMT_____PITI_____
NEED DOCS? Y N		Extra PMT Y N	
Real Estate	Homestead	**Business Debt**	
Rental			
Business		**NOTES**	
529/Annuity			
OTHER			

INCOME 1	Other Income	CASHFLOW	
INCOME 2	Protection	Assets (Savings)	Liability (Debt)
Ever done a budget? Y N		**REFERRALS**	Phone/Email
		1	
RECREATION		2	
		3	

NEXT IFR DATE???