

LifePrint® Advantage: CLIENT INFORMATION FORM

Please correct any pre-filled information and complete the blank areas. If you are unsure about a question or the question does not apply to you, please leave blank. Feel free to contact our office with any questions at 847.559.0800.

Full Legal Name:		Nickname:	
Primary/Preferred Phone #:	<input type="checkbox"/> Cell	<input type="checkbox"/> Home	<input type="checkbox"/> Work
Secondary Phone #:	<input type="checkbox"/> Cell	<input type="checkbox"/> Home	<input type="checkbox"/> Work
Primary Email Address:	<input type="checkbox"/> Personal	<input type="checkbox"/> Work	
Secondary Email address:	<input type="checkbox"/> Personal	<input type="checkbox"/> Work	
Preferred Method of Contact:	<input type="checkbox"/> Phone	<input type="checkbox"/> Email	<input type="checkbox"/> Text
Legal Address (No PO Box):			
Mailing Address (if different than legal) <input type="checkbox"/> Yes <input type="checkbox"/> No			
If Mail Address is Different List Here:			
Date of Birth (mm/dd/yyyy): / /		SSN:	
Marital Status: <input type="checkbox"/> Married, If YES, please add anniversary date: / /			
<input type="checkbox"/> Divorced		<input type="checkbox"/> Widowed	
<input type="checkbox"/> Single and never married			
Drivers License #:		Drivers License Issue Date:	
Drivers License Expiration Date:		Drivers License State:	
Employment Status: <input type="checkbox"/> Employed <input type="checkbox"/> Unemployed <input type="checkbox"/> Retired <input type="checkbox"/> Student/Minor			
<input type="checkbox"/> Homemaker <input type="checkbox"/> Self Employed			
Employer's Name:		Employers Address:	
Job Title:		Current Household Income:	
Citizenship:			

Federal Tax Bracket ?

- 15% and below
- 15.1% to 27.5%
- Over 27.5%

Investment Knowledge ?

- None Good
- Limited Excellent

Risk Tolerance ?

- Conservative Moderately Aggressive
- Aggressive Speculative
- Moderate Moderately Conservative

Investment Experience (indicate # _____ of years)

- Mutual Funds Bonds Variable Annuities
- Stocks Limited Partnerships Options



Securities offered through Securities America, Inc. (SAI), member FINRA/SIPC. Advisory services offered through Securities America Advisors, Inc. (SAA) and Arbor Point Advisors (APA). SOP, SAI, SAA & APA are separate entities.

2610 Lake Cook Road, Suite 250 • Riverwoods, IL 60015
P: 800.596.0253 | F: 800.596.0306 | 2NDpartners.com

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Trusted Contact Name:
Trusted Contact Phone:

Trusted Contact Relation:

- Spouse Family
 Child Other:
 Friend

For statements, do you prefer:

- eDelivery (Electronic Statements)
 Mailed Paper Statements

Preferred month for review meetings:

Preferred method of review meeting:

- In person
 Phone Call
 Web Meeting

If IN PERSON was chosen - Which meeting location is your preference?

- Riverwoods Office
 Aurora Office
 Naperville Office

Other:

<input type="text"/>
<input type="text"/>
<input type="text"/>

Hobbies of interest:

- | | | |
|--------------------------------------|--------------------------------------|---|
| <input type="checkbox"/> Reading | <input type="checkbox"/> Photography | <input type="checkbox"/> Music |
| <input type="checkbox"/> Arts/Crafts | <input type="checkbox"/> Cooking | <input type="checkbox"/> Gardening |
| <input type="checkbox"/> Games | <input type="checkbox"/> Fishing | <input type="checkbox"/> Watching TV/Movies |
| <input type="checkbox"/> Dancing | | |

Would you be interested in any of the events below?

- | | |
|---|--|
| <input type="checkbox"/> Wine Tasting | <input type="checkbox"/> Minor League Baseball |
| <input type="checkbox"/> Cooking Class | <input type="checkbox"/> Educational Workshops |
| <input type="checkbox"/> Liquor Tasting | <input type="radio"/> Taxes |
| <input type="radio"/> Tequila | <input type="radio"/> Estate Planning |
| <input type="radio"/> Whiskey | <input type="radio"/> College |
| <input type="radio"/> Vodka | <input type="radio"/> Planning |
| <input type="radio"/> Bourbon | |

Other:

<input type="text"/>
<input type="text"/>
<input type="text"/>
<input type="text"/>



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