



**As many of you know, Taylor Financial Group, LLC enjoys doing things for our clients on a personal level. This information will be kept strictly confidential.**

**Please complete and return the following questionnaire.**

**If you are sending your response via e-mail:** please copy and paste this questionnaire into a new e-mail, complete it, and send it to **dcurtin@taylorfinancialgroup.com**

**If you are sending your response via mail:**

A postage paid envelope is enclosed for your convenience

**Client Name(s):**

(1) \_\_\_\_\_ (2) \_\_\_\_\_

(The following info will be used to cross-check our database any discrepancies)

DOB: _____	DOB: _____
SSN: _____	SSN: _____
E-mail address: _____	E-mail address: _____
Home Phone: _____	Home Phone: _____
Cell Phone: _____	Cell Phone: _____

**How do you prefer to be contacted?**

(1)	<input type="checkbox"/> Home phone	(2)	<input type="checkbox"/> Home Phone
	<input type="checkbox"/> Work phone		<input type="checkbox"/> Work Phone
	<input type="checkbox"/> Cell phone		<input type="checkbox"/> Cell phone
	<input type="checkbox"/> E-mail		<input type="checkbox"/> E-mail

<b>Personal/Family Information</b>
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**Wedding Anniversary Date (mm/dd/yy):** \_\_\_\_\_

**Future Wedding Date (if engaged) (mm/dd/yy):** \_\_\_\_\_

**Shirt Size (S, M, L, XL, etc.):**

(1) \_\_\_\_\_ (2) \_\_\_\_\_



**Children's Information: (please add additional children if needed)**

Name: \_\_\_\_\_  
Address (if different from yours): \_\_\_\_\_

Social Security Number: \_\_\_\_\_  
Date of Birth: \_\_\_\_\_  
Email Address: \_\_\_\_\_

Name: \_\_\_\_\_  
Address (if different from yours): \_\_\_\_\_

Social Security Number: \_\_\_\_\_  
Date of Birth: \_\_\_\_\_  
Email Address: \_\_\_\_\_

Name: \_\_\_\_\_  
Address (if different from yours): \_\_\_\_\_

Social Security Number: \_\_\_\_\_  
Date of Birth: \_\_\_\_\_  
Email Address: \_\_\_\_\_

Name: \_\_\_\_\_  
Address (if different from yours): \_\_\_\_\_

Social Security Number: \_\_\_\_\_  
Date of Birth: \_\_\_\_\_  
Email Address: \_\_\_\_\_

**Employment Information (if retired, see below):**

(1) Employer: \_\_\_\_\_  
Position: \_\_\_\_\_  
Address: \_\_\_\_\_  
Phone #: \_\_\_\_\_

(2) Employer: \_\_\_\_\_  
Position: \_\_\_\_\_  
Address: \_\_\_\_\_  
Phone #: \_\_\_\_\_



**If retired, where did you work previously?**

- (1) Employer: \_\_\_\_\_ (2) Employer: \_\_\_\_\_  
Position: \_\_\_\_\_ Position: \_\_\_\_\_

**Personal Preferences**

**Which birthday item would you prefer to receive?**

- (1) \_\_\_ Birthday Cake (2) \_\_\_ Birthday Cake  
\_\_\_ Healthy Birthday Gift \_\_\_ Healthy Birthday Gift  
Please list any food allergies Please list any food allergies  
\_\_\_\_\_

**What types of entertainment do you enjoy?**

- (1) \_\_\_\_\_ (2) \_\_\_\_\_

**What types of client events would you participate in? (Educational, cooking, active, cultural etc.)**

- (1) \_\_\_\_\_ (2) \_\_\_\_\_

**What type of reading (or books) do you prefer?**

- (1) \_\_\_\_\_ (2) \_\_\_\_\_

**How often would you like to review your portfolio?**

- (1) \_\_\_\_\_ (2) \_\_\_\_\_

**Would you like your portfolio reviews to be in person, go to meeting (virtual) or on the phone?**

- (1) \_\_\_\_\_ (2) \_\_\_\_\_.



**Would you like us to contact you when there are market events?**

(1) \_\_\_\_\_ (2) \_\_\_\_\_

**New/Changes/Additions to Other Advisors**

**Attorney (Name/Address/Phone #):**

1) \_\_\_\_\_ (2) \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**CPA (Name/Address/Phone #):**

1) \_\_\_\_\_ (2) \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Other Advisors (Name/Address/Phone #):**

1) \_\_\_\_\_ (2) \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

1) \_\_\_\_\_ (2) \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

1) \_\_\_\_\_ (2) \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_