SERVICE ALL ABOUT YOU

This form is to help us better serve you during and after the process. Thank you for your cooperation in filling out this information.

Name _____

Date of Birth ____-____-____

Email Address _____

Spouse's Name _____

Date of Birth ____-____-____

Email Address _____

Are you on Facebook? Yes____ No____

Names of children living at home and date of birth

1)_____ ___/___/____

2)_____ ___/___/____

3)_____ ___/___/____

We communicate often with our clients to reduce this stressful process.

Please tell us how we can best communicate with you.

Are you available to talk at work? Yes / No If yes, your number_____ ext._____

What is the best number to reach you on Thursdays for your update calls?

_____ Alternate number _____

More About You – The Fun Part

My/Our Favorite Restaurant is _____

My favorite hobby(s) is_____

My dream vacation is _____

My pet is a dog / cat / other _____named _____

My best friend is _____

My favorite movie _____

More About You – The Business Part

Do you have a financial planner? Yes / No If yes who? _____

Do you have a Will/Trust completed? Yes / No

Do you have an insurance professional? Yes / No If yes who? _____

Do you have a CPA? Yes / No If yes who? _____

Do you have any other professional assisting you with your money? _____

If yes who? _____

Do you do a budget monthly? Yes / No If yes...describe_____

_____

Are there any other professionals or services we can assist you with? Yes / No

If yes how can we help? _____

_____

COOKE REALTY PARTNERS