

PERSONAL FINANCIAL PROFILE

All information that you provide is strictly CONFIDENTIAL and will not be disclosed to anyone without your consent. Please send this form to us through our secure link on our website in the Get Started or Contact Us pages.



PERSONAL FINANCIAL PROFILE

All information that you provide is strictly confidential and will not be disclosed to anyone without your consent.

How did you discover Partnership Financial, LLC?

General Information

| | | | Client | | | Co-Client | t |
|-----------------------------------------------|-------|--------|-----------|--------|-------|-----------|---------|
| Name | | | | | | | |
| Birthdate | | | | | | | |
| Home Address | | | | | | | |
| City, State, Zip | | | | | | | |
| Business Address | | | | | | | |
| City, State, Zip | | | | | | | |
| Email | | | | | | | |
| Preferred Phone | | | | | | | |
| | | | | | | | |
| Other Phone | ne· 🗆 | Single | □ Married | □ Divo | arced | □ Widowed | □ Other |
| Please check o | ne: 🗆 | Single | □ Married | □ Divo | orced | □ Widowed | □ Other |
| Please check o | ne: 🗆 | | □ Married | □ Divo | orced | □ Widowed | |
| Please check o | ne: | | | □ Divo | orced | | |
| Please check or | ne: | | | □ Divo | orced | | |
| Please check or Income Occupation | ne: | | | □ Divo | orced | | |
| Please check or Income Occupation Employer | ne: | | | □ Divo | orced | | |



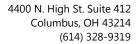


Dependents and Adult Children

| Name | Relationship | Birthdate | Resides in City, State |
|----------------------------------------------------------------------------|-------------------------|-----------|------------------------|
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| Do any of your dependents have d What are your three most importa 1. | nt financial goals/cond | cerns? | |
| 2 | | | |
| 3 | | | |

Value of Assets

| Description | Client | Co-Client |
|--------------------------------------------------|--------|-----------|
| Regular Non-Retirement Accounts: | | |
| Cash Accounts (checking & savings) | | |
| CDs | | |
| Mutual Funds, Stocks, Bonds | | |
| Other Investments | | |
| Retirement Accounts: | | |
| Employer Plans (401k, 403b, deferred comp, etc.) | | |
| Traditional IRAs | | |
| Roth IRAs | | |
| Other | | |
| Real Estate: | | |
| Primary Residence & Provide Date Purchased | | |
| Other Real Estate | | |
| Other | | |
| Annuities | | |
| 529 Plans | | |
| Other | | |





| Pension available? State or Federal System -Oans | □ Y □ N ? □ Y □ N | | |
|--------------------------------------------------------|--------------------------------------|----------|-----------------------------|
| Description | Current Balance (\$) | Rate (%) | Loan Length (if applicable) |
| Home Mortgage | | | <u> </u> |
| Other Mortgage | | | |
| Auto Loan #1 | | | |
| Auto Loan #2 | | | |
| Student Loans | | | |
| Credit Card #1 | | | |
| Credit Card #2 | | | |
| Personal / Family Loans | | | |
| state Document | at a variable rate? Please add detai | | |



Life Insurance

| Person Insured | Insurance Company (if through employer, write "group") | Death Benefit | Term or Permanent | Years Remaining (Term Only) | Annual Premium |
|---------------------|--------------------------------------------------------------|-------------------|----------------------|-----------------------------------|--------------------------------------------------------------|
| | J 1 . | | | , , , | |
| | | | | | |
| | | | | | |
| | | | | | |
| Please list any oth | er concerns regarding in | surance coverage | e. | | |
| Other Inform | | | | | |
| Do you work with | a tax professional? | □ Y □ N | | | |
| Does your tax pro | fessional provide any ta | x planning or pro | jection service | es? 🗆 Y | □ N |
| How much are you | u currently paying in tax | preparation fees | ? | | |
| | ı expect to annually earn –8% □ 10 – 12% □ | • | ents? ot Sure | | |
| What did you do | the last time the stock m | arket went down | by 10% or me | ore? | |
| Have you ever be | en unhappy with the reco | ommendations of | a financial ac | dvisor, insura | nce agent, or stock |
| broker? Please ex | | | | | J . 4 . 2. 2. 2. 2. 2. 2. 2. 2. 2. 2. 2. 2. 2. |
| | | | | | |

Are there other concerns or items you would like to share with us?