

Client Information SmartForm



Please fill in the following blanks to the best of your ability.

Legal First Name: _____ Legal Middle Name: _____
 Legal Last Name: _____ Preferred: _____
 DoB: _____ SSN or Tax ID: _____ Marital Status: _____

Physical Address: _____ City: _____ State: _____ ZIP: _____
 Mailing Address: _____ City: _____ State: _____ ZIP: _____

Primary Phone Number: _____ Type: _____
 Secondary Phone Number: _____ Type: _____
 Email Address: _____

Check this box if any of your contact information has changed recently.

Employer: _____ Job Title: _____
 Employer Address: _____

Annual Gross Income	Tax Bracket	Net Worth	Liquid Net Worth
\$0 - \$49k	10%	\$0 - \$49k	\$0 - \$49k
\$50k - \$99k	12%	\$50k - \$99k	\$50k - \$99k
\$100k-\$199k	22%	\$100k - \$199k	\$100k - \$199k
\$200k - \$499k	24%	\$200k - \$499k	\$200k - \$499k
\$500k-\$1mm	32%	\$500k - \$999k	\$500k - \$999k
> \$1mm	35%	\$1mm - \$2.5mm	\$1mm - \$2.5mm
	37%	> \$5mm	> \$5mm

Desired Portfolio Strategy	Risk Tolerance	Time Horizon
Aggressive Growth	Aggressive	Less than 3 years
Growth	Moderately Aggressive	3 – 5 years
Balanced w/ Growth	Moderate	6 – 9 Years
Balanced	Moderately Conservative	Greater than 10 years
Conservative Balanced	Conservative	
Conservative		
Aggressive Income		

Life Insurance Cash Value: _____ Type of Policy: _____
 Assets at Other Firms: _____

How did you hear about us? _____

1300 McFarland Blvd. NE, Suite 125, Tuscaloosa, AL 35406
 205-345-9733

Securities offered through SA Stone Wealth Management Inc. Member FINRA/SIPC.
 Advisory services offered through SA Stone Investment Advisors Inc.

