NORTH RIVER
WEALTH ADVISORS

Client Profile

PERSONAL INFO

	Name	Date of Birth	Phone Number	Email
Client				
Co-Client				

Children

Name	Date of Birth
1.	
2.	
3.	
4.	

TAXES

Filing Status

○ Individual ○ Head of Household ○ Married, Filing Jointly ○ Married, Filing Separately

Home Address

Street	City, State	Zip Code

NORTH RIVER
WEALTH ADVISORS

INCOME

Employment Income

Description	Earner	Salary (and commission or bonuses)
1.		
2.		
3.		

Social Security

	Name	Monthly Primary Insurance Amount (PIA)	Age to Begin
Client			
Co-Client			

Other Income (Pension, Rental Property Income, Annuity Income, etc.)

Description	Earner	Annual Amount	Year it Begins	Year it Ends
1.				
2.				
3.				

NORTH RIVER
WEALTH ADVISORS

GOALS

Retirement

Retirement Age

Client	
Co-Client	

% of Current Lifestyle

Ret. Expense	

Education

Student Name	Cost (or School if known)	Start Year
1.		
2.		
3.		
4.		

Other Goals

Description	Cost	Start Year	# of Years
1.			
2.			
3.			
4.			
5.			
6.			
7.			

ACCOUNTS & ASSETS

Bank Accounts/ Investment Accounts/Individual Retirement Accounts

(Please provide statements for investment accounts)

Description	Account Type	Owner	Value	Annual Savings
1.				
2.				
3.				
4.				
5.				
6.				
7.				
8.				

Employer Sponsored Retirement Plans

Description	Type	Owner	Value	Annual Savings	Employer Match
1.					
2.					
3.					
4.					

Other Assets (Personal Home, Vacation Home, Business, Car, etc.)

Description	Value	Ownership
1.		
2.		
3.		
4.		

EXPENSES

Liabilities (Mortgage, Credit Cards, Car Loans, Student Loans, Personal Loans, etc.)

Description/Lender	Loan Type	Balance	Interest	Month. Payment	Orig. Date
1.					
2.					
3.					
4.					

Insurance Policies

Description/Company	Type	Owner	Benefit
1.			
2.			
3.			
4.			

Monthly Household Expenses excluding mortgage, loans, insurance premiums

***Feel free to add additional information**