

Client Data Sheet

Client Name	Date

Primary Contact		
Name (Last, First MI)	Home Phone	Work Phone
Fax	Email	
Home Address		
City, State & Zip		
Preferred Contact Method	Preferred Newsletter Method	
Social Security Number	Date of Birth	
Employer	Job Title	
Employment Address		
City, State & Zip		
Driver's License #	Expiration Date	Issue Date
Secondary Contact (i.e. Spouse)		
Name (Last, First MI)	Work Phone	Fax
Relationship to Primary	Email	
Preferred Contact Method		
Social Security Number	Date of Birth	
Employer	Job Title	
Employment Address		
City, State & Zip		
Driver's License #	Expiration Date	Issue Date
Dependents		
Name	Work Phone	
Relationship to Primary	Email	
Preferred Contact Method		
Social Security Number	Date of Birth	
Employer	Job Title	
Employment Address		
City, State & Zip		
Driver's License #	Expiration Date	Issue Date
Name	Work Phone	
Relationship to Primary	Email	
Preferred Contact Method		
Social Security Number	Date of Birth	
Employer	Job Title	
Employment Address		
City, State & Zip		
Driver's License #	Expiration Date	Issue Date
Name	Work Phone	
Relationship to Primary	Email	
Preferred Contact Method		
Social Security Number	Date of Birth	
Employer	Job Title	
Employment Address		
City, State & Zip		
Driver's License #	Expiration Date	Issue Date

(Over)

Client Data Sheet

Client Name	Date

Accountant		
Firm Name	Phone	Fax
Advisor Name	Email	
Address		
City, State & Zip		
Attorney		
Firm Name	Phone	Fax
Advisor Name	Email	
Address		
City, State & Zip		
Banker		
Firm Name	Phone	Fax
Advisor Name	Email	
Address		
City, State & Zip		
Life Insurance Agent		
Firm Name	Phone	Fax
Advisor Name	Email	
Address		
City, State & Zip		
Property & Casualty Agent		
Firm Name	Phone	Fax
Advisor Name	Email	
Address		
City, State & Zip		
Stock Broker or Planner		
Firm Name	Phone	Fax
Advisor Name	Email	
Address		
City, State & Zip		

I hereby authorize Vantage Financial Partners Limited and its agents to release information to any of the above referenced advisors or any other party added by me in writing, in the future. This information includes, but is not limited to, account assets, transactions, confidential personal information and tax data. This authorization will remain in force until such time that I notify Vantage in writing.

Signature

Date

Signature

Date