

New Client

Big Case Analyzer Data Sheet

Please complete as much of this form as possible with information that is easily available. This form is designed to serve you, not be a burden to you. You can add data to this PDF file and email to us or print the form, write in the data and fax to (317) 571-3615.

YOUR INFORMATION

Name	Initial Date
Phone	Advisor Associated With

CLIENT PERSONAL INFORMATION

Client Name	DOB/Age	Health
Spouse Name	DOB/Age	Health

CLIENT FAMILY INFORMATION

What can you tell us about the client's family?

Children (age)	Spouses (age)	Grandchildren (age)	Planning Considerations/Issues:
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CLIENT ASSETS

What can you tell us about the client's assets?

Assets

Value

Comments

CLIENT LIABILITIES

What can you tell us about the client's liabilities?

Liabilities

Value

Comments

Approximate Net Worth

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INSURANCE

What can you tell us about the client's insurance policies?

	Face	Premium	CSV	Insured	Owner	Beneficiary	Type	Issue date	Company
Policy 1									
Policy 2									
Policy 3									
Policy 4									
Policy 5									
Policy 6									

PRIMARY OBJECTIVES

What are the clients' *'Hot Buttons'* and primary objectives? (Please be as specific as possible.)

Description

Importance

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INCOME SOURCES

	Amount	Comments
Client Earned Income		
Spouse Earned Income		
Investment Income		
Ira and/or Pension		
Social Security		
Other		

TOTAL

CLIENT CASH FLOW NEEDS

What is the total amount per year after taxes and premiums?

Total

Comments

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PREVIOUS PLANNING/EXISTING SITUATION

His	Hers	Description/General Result
		Will
		RLT
		Dur. POA
		Health Dir.
		FLP1
		FLP2
		CRUT
		GRAT
		IDGT
		Priv. Fndn.

EXISTING ADVISORS

Please list any existing advisors that are currently involved with this case, or you feel are important to this case.

	Lawyer	Accountant	Insurance Agent	Trust Officer
Name				
City, State				
Comment				

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QUESTIONNAIRE

What is the main thing you want to talk about with us and with client?

What is the client expecting as the next step from you?

Do you have a next meeting scheduled? If so, when?

What planning ideas have you considered?

Is there any competition? Should this be a concern?

Who else will the client consult before making a major decision?

To what extent should we involve these others in the case development process?

Next Steps