NELSON FINANCIAL™

DESIGN • GROW • PROTECT

Specializing in helping grow and protect the wealth of family farms, ranches, and unique professionals serving rural America.

Client Information Sheet

Full Name		Date	
Place of Employment			
Occupation			
Date of Hire			
Spouse's Name			
Spouse's Employer			
Spouse's Occupation			

Home Address	
City, State, Zip	

Mailing Address *(if different)*	
City, State, Zip	

Work Address	
City, State, Zip	

Home Phone #	
Cell Phone #	
Work Phone #	
Email Address	

Date of Birth			
Social Security #			
Driver's License #		State	
Driver's License Expiration Date			

Beneficiaries: Name, SSN, DOB, Relationship to you (Specify whether Primary or Contingent)	*Please fill in this information on Page 2*

Areas you would like our help in:	Other Professionals You Work With:		
We help you clarify your dreams and inspire your plans for your future. We provide the advice to grow and protect your wealth in order to achieve your dreams.	*As truly independent financial planners, we manage complex relationships with your other professional advisors.*	Would you recommend this person to family/friends?	
□ Achieving Financial Independence	Financial Advisor:	YES	NO
□ Investment Advice	Accountant:	YES	NO
□ Financial Planning	Attorney:	YES	NO
□ Retirement Planning	Insurance Agent:	YES	NO
□ Retirement Income Planning	Banker:	YES	NO
□ College Funding			
□ Estate Planning	**Products you want our help with:**		
□ Insurance Consulting	*We provide independent advice on the financial tools you need to implement your plan and achieve your goals.*		
□ Life Insurance	□ Mutual Funds/ETFS	□ Life Insurance	
□ Car Insurance	□ Stocks/Bonds	□ Disability Insurance	
□ Home Insurance	□ Annuities	□ Long Term Care Insurance	
□ Businsess/Farm Insurance	□ CD's	□ Health Insurance	
□ Health Insurance		□ Other______________	
□ Other______________			

BENEFICIARIES

Primary

Name	SSN	DOB	Relationship	%

Contingent

Name	SSN	DOB	Relationship	%

Emergency / Trusted Contact

Name	Address (Physical and Mailing)	City, State, Zip Code	Phone Number	Relationship

PLEASE RETURN TO US @ Christopher@jnelson-financial.com or FAX (970)521-5091 or PO Box 750, Sterling, CO 80751