

FORM Easy Reference Guide

Here is an example of the type of FORM information that will help you create and maintain high levels of rapport and deliver personalized service to your high value clients.

<h2>FAMILY</h2>	<ul style="list-style-type: none"> • Spouse (who, how long, how they met, milestone anniversary) • Children (names, ages, interests, accomplishments) • Grandchildren (names, ages, interests, accomplishments) • Pets (how many, what type, names) • Health Issues or other Special Situations (related to client, spouse or their children)
<h2>OCCUPATION</h2>	<ul style="list-style-type: none"> • Occupation (client and spouse, for how long, where) • Retirement (retired or retirement goal date - of client and spouse) • Business Owner (type, how long, long-term intentions, etc.) Note: → Introduce them to commercial services • Professional education and/or credentials • Professional successes and/or accomplishments
<h2>RECREATION</h2>	<ul style="list-style-type: none"> • Sports and Recreation (play, coach, watch, fan) • Personal Interests (hobbies, volunteering) • Music (play it, listen to it, types) • Reading (favorite types of books, favorite authors, reading club) • Favorite Traditions (occasions, celebrations, reunions) • Travel (seasonal/annual, favorite place, cottage or vacation home, boat) • Charities and other causes supported (volunteer positions) • Service Clubs and Organizations (client or participant) • Alumni of (Universities, associations)
<h2>MONEY</h2>	<ul style="list-style-type: none"> • Primary Financial Goals and Objectives (Short term/medium term/long term goals) • Primary Banking Information (Transactional Accounts, Credit Accounts, Mortgage Accounts) • Investment Strategies (Current savings accounts, FI and rates) • Retirement Strategies (Current retirement accounts, FI and rates) • Real Estate Assets (principal residence, vacation home, rental property, commercial property, other)