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**FORM Gathering Template**

Choose one of your high value clients and begin documenting their FORM profile below.

**CLIENT:**

**FAMILY:**

**Spouse/Partner** (who, how long, how they met, milestone anniversary):

**Children** (names, ages, interests, accomplishments):

**Grandchildren** (names, ages, interests, accomplishments):

**Pets** (how many, what type, names):

**Special Situations** (related to client, spouse/partner or their children):

**Other** (specify):

**OCCUPATION:**

**Current Occupation or retired** (for how long, where else, accomplishments):

**Previous Occupation** (for how long, where):

**Spouse’s/Partner’s Occupation** (for how long, where):

**Retirement** (retired or retirement goals - of client and spouse/partner):

**Business Owner** (do they own any other type of business, how long, etc.):

**Other** (specify):

**RECREATION:**

**Sports & Recreation** (play, coach, watch, full-fledged 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 & Organizations** (client or participant):

**Alumnus of** (Universities, associations):

**Other** (specify):

**MONEY:**

This information relates directly to the client financial situation and there are specific processes within the Proven Strategies Advantage program to deal with Money.

**In creating this Client FORM profile, have you identified an opportunity for a Moment of Truth? If so, explain.**