

# CLIENT CONTACT FORM

### GENERAL INFORMATION

NAME:	DOB:		
ADDRESS:	CITY:	STATE:	ZIP:
PHONE[1]:	PHONE[2]:		
EMAIL[1]:	EMAIL[2]:		

### BENEFICIARY INFORMATION

MARITAL STATUS:     SINGLE     MARRIED     SEPARATED     DIVORCED     WIDOWED

SPOUSE NAME:                      PHONE:                      EMAIL:                      DOB:

NUMBER OF DEPENDENTS:
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DEPENDENT NAME:                      DOB:

DEPENDENT NAME:                      DOB:

DEPENDENT NAME:                      DOB:

### EMPLOYMENT INFORMATION

EMPLOYER:                      OCCUPATION:                      LENGTH OF TIME AT POSITION:

KINSHIP WEALTH PARTNERS  
 1050 CROWN POINTE PARKWAY, SUITE 1700, ATLANTA, GA 30338 ♦ TEL: 770-512-5100 ♦ FAX: 770-512-5154  
 KINSHIPWEALTHPARTNERS.COM

Securities and Investment Advisory services are offered through Registered Representatives and Investment Adviser Representatives of Equity Services, Inc., Member FINRA/SIPC, 1050 Crown Pointe Parkway, Suite 1700, Atlanta, GA 30338 (770) 512-5100. Kinship Wealth Partners is independent of Equity Services, Inc., TC114690(0520)1

**CLIENT HISTORY**

1. HAVE YOU WORKED WITH A FINANCIAL ADVISOR BEFORE? IF YES, WHAT WAS YOUR EXPERIENCE? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
2. WHAT HAVE YOU DONE TO FINANCIALLY PLAN IN THE PAST 10 YEARS? 5 YEARS? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
3. WHAT ARE YOUR FINANCIAL CONCERNS, AND HOW DO YOU HOPE I CAN SOLVE THEM WITH YOU? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
4. HOW DID YOU HEAR ABOUT KINSHIP WEALTH PARTNERS? \_\_\_\_\_  
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