

Beechwood Financial Services, LLC

Fee-only Comprehensive Financial Planning

**Confidential Personal
Financial Profile**

Date Completed: _____

| | Name | Age | Life Expectancy | Date of Birth | Social Security # |
|-----------------------|------|-----|-----------------|---------------|-------------------|
| Client 1 | | | | / / | - - |
| Client 2 | | | | / / | - - |
| Children & Dependents | | | | / / | - - |
| | | | | / / | - - |
| | | | | / / | - - |

| | | | | |
|--------------|--|--|------------|-------|
| Home Address | | | Home Phone | () - |
| | | | Home Fax # | () - |
| Email | | | | |

| | Client 1 | Client 2 |
|------------------|------------|------------|
| OCCUPATION | # of Years | # of Years |
| Business Name | | |
| Business Address | | |
| Business Phone | () - | |
| Fax Number | () - | |
| Email | | |
| Retirement Age | | |

Miscellaneous Information:

| | | | |
|-----------------|-----|-----------------|--|
| Marriage Date | / / | Insurance Agent | |
| Referral Source | | Stockbroker | |