Prosper
Financial Group
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contact@myprosperfinancial.com

Client Intake Form

What to do before your appointment

To make the most of our time together, we like to review your accounts **before** your appointment. This allows us to clearly understand your current financial picture and tailor a strategy that aligns with your goals.

Reviewing these documents in advance helps us keep your appointment focused, productive, and personalized from the start.

Please email this form and the most recent copies (within the last 90 days) of the following to contact@myprosperfinancial.com, if applicable:

- ☐ Retirement account statements (401(k), 403(b), IRA, etc.)
- ☐ Employer 401(k) match details (percentage and vesting schedule)
- ☐ Company stock purchase plan (ESPP) documents
- ☐ Social Security benefit estimates or Pension statements
- ☐ Brokerage or investment account summaries
- ☐ Life and Disability plan statements
- ☐ Any other relevant financial or insurance documents

If you're unable to email them, please make sure you can **log in to your online accounts during the meeting** or **print and bring the document.**

1. Personal Information

Full Name: ____________ Preferred: ____________

Birthdate: ____________ State born: ____________ SSN: ____________

Cell: ____________ Preferred contact method: Email ☐ Call ☐ Text ☐

Email: ____________

Address: ____________

Driver's License:* ____________ Exp: ____________ State: ____________

**OR – please text a picture to 616.344.9170*

Marital Status: Single ☐ Engaged ☐ Married ☐ Separated ☐ Divorced ☐ Widowed ☐

2. Family & Household:

Spouse/Partner Name: Preferred:

Email: Cell:

Birthdate: State born: SSN:

Driver's License*: Exp: State:

OR – please text a picture to 616.344.9170

Children/Dependents Names:	Birthdates:

3. Employment & Financial Information:

Employer: Start Date – MM/YYYY:

Address:

Occupation: Duties:

Annual Income: Are you a homeowner? Yes ☐ No ☐

Spouse's Occupation & annual Income if applicable:

Bank: City, State:

Routing#: Account #:

4. Other Professionals

Do you have a will or trust? Yes ☐ No ☐

When was the last time you reviewed?

Who is your estate planning attorney?

How do you prepare taxes? (CPA, TurboTax…)

Who is your Property Casualty company/agent?

Last time you reviewed your home and auto?