

**Mercier Financial Services**  
**Financial and Insurance Intake form**

**CONTACT INFO - Client #1**

Name: \_\_\_\_\_ Gender \_\_\_\_\_ Birth date \_\_\_\_\_

Address: \_\_\_\_\_

Phone (Home) \_\_\_\_\_ Permission to call? (Y/N) \_\_\_\_\_ Best time to call \_\_\_\_\_

Phone (Cell) \_\_\_\_\_ Permission to call? (Y/N) \_\_\_\_\_ Best time to call \_\_\_\_\_

E-Mail Address: \_\_\_\_\_

Occupation \_\_\_\_\_ Employer \_\_\_\_\_

Income: \_\_\_\_\_ (salary, hourly or commission) do you work over time? (Y/N)

**CONTACT INFO - Client #2**

Name: \_\_\_\_\_ Gender \_\_\_\_\_ Birth Date \_\_\_\_\_

Address: \_\_\_\_\_

Phone (Home) \_\_\_\_\_ Permission to call? (Y/N) \_\_\_\_\_ Best time to call \_\_\_\_\_

Phone (Cell) \_\_\_\_\_ Permission to call? (Y/N) \_\_\_\_\_ Best time to call \_\_\_\_\_

E-Mail Address: \_\_\_\_\_

Occupation: \_\_\_\_\_ Employer: \_\_\_\_\_

Salary: \_\_\_\_\_ (salary, hourly or commission) do you work over time? (Y/N)

Do you get paid Bonus? Y/N \$ \_\_\_\_\_

Children:

Name: \_\_\_\_\_ Gender \_\_\_\_\_ Birth Date: \_\_\_\_\_

Name: \_\_\_\_\_ Gender \_\_\_\_\_ Birth Date: \_\_\_\_\_

Name: \_\_\_\_\_ Gender \_\_\_\_\_ Birth Date: \_\_\_\_\_

Are you working with an Advisor now (Y/N?) If so name \_\_\_\_\_

Is there a will: (Y/N) \_\_\_\_\_ Do you have a family Lawyer? Y/N \_\_\_\_\_

Is there Insurance in place? \_\_\_Y\_\_\_ N What Type \_\_\_\_\_ How much? \_\_\_\_\_

When does it expire? \_\_\_\_\_ What is your monthly or Yearly premium? \_\_\_\_\_

How did you find me: \_\_\_\_\_ (google, friend etc...?)

Client #1

Client #2

Do you receive any additional money?

Child Support Y/N \$ \_\_\_\_\_

Child Tax Benefit Y/N \$ \_\_\_\_\_

Spousal Support Y/N \$ \_\_\_\_\_

**ASSETS:** (Home, Savings, TFSA, RRSP, Pensions, vehicles etc....)

1. \_\_\_\_\_ Estimated Value: \_\_\_\_\_

2. \_\_\_\_\_ Estimated Value: \_\_\_\_\_

3. \_\_\_\_\_ Estimated Value: \_\_\_\_\_

4. \_\_\_\_\_ Estimated Value: \_\_\_\_\_

5. \_\_\_\_\_ Estimated Value: \_\_\_\_\_

6. \_\_\_\_\_ Estimated Value: \_\_\_\_\_

DEBTS: (Car loan, Truck loan, mortgage, lines of Credit, credit card student loans etc....)

1. \_\_\_\_\_ Estimated balance: \_\_\_\_\_

2. \_\_\_\_\_ Estimated Balance: \_\_\_\_\_

3. \_\_\_\_\_ Estimated Balance: \_\_\_\_\_

4. \_\_\_\_\_ Estimated Balance: \_\_\_\_\_

5. \_\_\_\_\_ Estimated Balance: \_\_\_\_\_

6. \_\_\_\_\_ Estimated Balance: \_\_\_\_\_

7. \_\_\_\_\_ Estimated Value: \_\_\_\_\_

8. \_\_\_\_\_ Estimated Value: \_\_\_\_\_

**Explain briefly what your financial issues are and what you would like me to help you with?**

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Office notes:

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