



MIRAU CAPITAL MANAGEMENT, INC.

CLIENT PROFILE FORM

At Mirau Capital Management we are constantly updating our information with anything new that is happening with you. This allows us to better serve you while, improving our relationship with you as well.

Date: _____

CLIENT NAME: _____

SPOUSE'S NAME: _____

Physical Address: Street: _____

City: _____ State: _____ Zip: _____

Mailing Address: (if different): _____

City: _____ State: _____ Zip: _____

Email Address: (1): _____

(2): _____

Residence phone: _____

Cell phone: _____ Spouse's cell phone: _____

Place of work: _____ Business phone: _____

Spouse place of work: _____ Business phone: _____

Retired?: Y N Retired from _____ When? _____

Spouse retired?: Y N Spouse Retired from _____ When? _____

If not yet retired, retirement date?: _____ Spouse: _____

DOB _____ Spouse's DOB _____

Wedding anniversary: _____

How often would you prefer to meet with Brian about your personal financial situation?

- a. Quarterly b. Annually c. Semi-annually d. Each annual review

Do you have an accountant? Y N Do you have an attorney? Y N

Name _____ Name _____

FUN STUFF!

1. How did you meet your spouse/partner? _____
2. Do you have children? Y N How many? _____
Names _____, _____, _____
_____, _____, _____
3. Do you have grandchildren? Y N How many? _____
_____, _____, _____
_____, _____, _____
4. *Do you collect anything? Y N What do you love to collect? _____
5. Name two things on your bucket list:
1. _____ 2. _____
6. Are you a fan of any sports team? Y N
Which one: _____
7. * What is your favorite restaurant? _____
*Spouse's favorite restaurant? _____
8. Would you consider yourself a:
a. Bookworm _____ b. Foodie _____ c. Adventurer _____
9. What kind of music do you like? _____
10. * Retired Military? Y N Branch: _____ Where Served? _____
*Spouse Retired Military? Y N Branch: _____ Where Served? _____
11. Coffee or Tea? _____
13. Do you drink wine? _____ If so, do you prefer red or white? _____
14. Do you prefer sweet or salty when snacking? _____
15. Favorite candy _____ Favorite salty snack _____
16. What do you like to read? _____
17. Which of the below topics interest you?:
Cooking Entertainment Home News
Travel Décor Fitness/Health Finance/Investing
18. * What are your hobbies?
1. _____ 2. _____ 3. _____
*Spouse's hobbies? 1. _____ 2. _____ 3. _____
19. Do you have pets? Y N
What kind _____ Names _____

Thank You

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