

# Client Relationship Builder - Consumer



CONFIDENTIAL

Primary Contact:		Secondary Contact:	
Residential Address:		Residential Address:	
Home Phone:		Home Phone:	
Mailing Address:		Mailing Address:	
Occupation:		Occupation:	
Date of Birth:	Social Security #:	Date of Birth:	Social Security #:
Employer:	Work Phone:	Employer:	Work Phone:
Mother's Maiden Name:		Mother's Maiden Name:	
Drivers Lic#:	Issue Date:	Expiration Date:	Drivers Lic#:
Issue Date:	Expiration Date:	Issue Date:	Expiration Date:
Occupation:		Occupation:	
Secondary Identification (check one): <input type="checkbox"/> VISA <input type="checkbox"/> MASTERCARD <input type="checkbox"/> AMERICAN EXPRESS <input type="checkbox"/> DISCOVER <input type="checkbox"/> OTHER		Secondary Identification (check one): <input type="checkbox"/> VISA <input type="checkbox"/> MASTERCARD <input type="checkbox"/> AMERICAN EXPRESS <input type="checkbox"/> DISCOVER <input type="checkbox"/> OTHER	
Issuer:	Expiration Date:	Issuer:	Expiration Date:

Who do you currently bank with?     B of A     Wells Fargo     Chase     Union Bank     Other

Deposit / Investment			
Account Type	Institution	Account Balance	Matures
Checking / Savings			
CD / IRA			
Annuity / Mutual Fund			
401K / Pension			
Other Accounts			

Do you have a:     Will     Living Trust

How do you pay your bills?     Checks     Online Banking     Bill Pay

How do you typically pay for the things your buy?     Check Card     Credit Card     Check / Cash

Other services used?     Overdraft Protection     Direct Deposit     Safe Deposit Box

Annual Income:     Less than \$50k     \$50 - \$100k     \$100 - \$250k     \$250 - \$500k

### Credit Needs

What credit needs do you anticipate having in the next 6-12 months? (i.e. purchase/refinance property)

