

# CONFIDENTIAL PERSONAL PROFILE

For free analysis please fill out as complete as possible  
And fax to 603-299-7889 or scan and email to [marc@cramgroup.com](mailto:marc@cramgroup.com)

**CLIENT PROFILE:** Date: \_\_\_\_/\_\_\_\_/\_\_\_\_

First Name: \_\_\_\_\_ Last Name: \_\_\_\_\_  
Spouse Name: \_\_\_\_\_ Phone Number: \_\_\_\_\_  
Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_  
Other Phone Number: \_\_\_\_\_ E-mail: \_\_\_\_\_

**Client:**

\*Date of Birth: \_\_\_\_\_ \*Age: \_\_\_\_ \*Sex: M / F  
\*Retirement Age: \_\_\_\_\_ Years employed: \_\_\_\_\_  
-Employer: \_\_\_\_\_  
-Occupation: \_\_\_\_\_  
\*Annual Income: (Gross): \$ \_\_\_\_\_  
\*After Tax Net Income: \$ \_\_\_\_\_  
-Other Income: \$ \_\_\_\_\_  
-Source: \_\_\_\_\_

**Spouse:**

-Date of Birth: \_\_\_\_\_ -Age: \_\_\_\_ -Sex: M / F  
-Retirement Age: \_\_\_\_\_ Years employed: \_\_\_\_\_  
-Employer: \_\_\_\_\_  
-Occupation: \_\_\_\_\_  
-Annual Income: (Gross): \$ \_\_\_\_\_  
-After Tax Net Income: \$ \_\_\_\_\_  
-Other Income: \$ \_\_\_\_\_  
-Source: \_\_\_\_\_

**Children/Dependents (or other information):**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Have you read *Missed Fortune, Missed Fortune 101 or Stop Sitting on Your Assets?* Yes / No

## Real Estate

**PROPERTY DETAILS:**

Primary Residence _____	Property 2 _____	Property 3 _____
*Original Pur. Date: _____	_____	_____
*Original Pur. Price: \$ _____	\$ _____	\$ _____
*Cost of Improve: \$ _____	\$ _____	\$ _____
Tot Mortgage Payments: \$ _____	\$ _____	\$ _____
Total Rental Income: \$ _____	\$ _____	\$ _____
*Fair Market Value: \$ _____	\$ _____	\$ _____

Client Name: \_\_\_\_\_

**CURRENT MORTGAGE DETAILS:**

<b>Primary Residence</b>	<b>Property 2</b>	<b>Property 3</b>
*Beginning Date: ____/____/____	____/____/____	____/____/____
*Term: _____ Yrs	_____ Yrs	_____ Yrs
*Type: (circle) Am / I O/ Option	Am / I O/ Option	Am / I O/ Option
*Amount: \$ _____	\$ _____	\$ _____
*Interest Rate: _____%	_____%	_____%
*Payment, P & I: \$ _____	\$ _____	\$ _____
*Remain Balance: \$ _____	\$ _____	\$ _____
Tax & Insurance: \$ _____	\$ _____	\$ _____

**SECOND MORTGAGE DETAILS:**

<b>Primary Residence</b>	<b>Property 2</b>	<b>Property 3</b>
*Beginning Date: ____/____/____	____/____/____	____/____/____
*Term: _____ Yrs	_____ Yrs	_____ Yrs
*Type: (circle) Am / I O/ Option	Am / I O/ Option	Am / I O/ Option
*Amount: \$ _____	\$ _____	\$ _____
*Interest Rate: _____%	_____%	_____%
*Payment, P & I: \$ _____	\$ _____	\$ _____
*Remaining Balance: \$ _____	\$ _____	\$ _____
Tax & Insurance: \$ _____	\$ _____	\$ _____

Do you have a 401k or other retirement plan? H \_\_\_ Yes \_\_\_ No W \_\_\_ Yes \_\_\_ No

If so, what do you contribute? H \_\_\_\_\_% annually \$\_\_\_\_\_ annually  
W \_\_\_\_\_% annually \$\_\_\_\_\_ annually

What does the company match? H \_\_\_\_\_% of the first \_\_\_\_\_%  
W \_\_\_\_\_% of the first \_\_\_\_\_%

What is the current value of your 401k and or IRA?

401k H \$ \_\_\_\_\_  
W \$ \_\_\_\_\_  
IRA H \$ \_\_\_\_\_  
W \$ \_\_\_\_\_