

A large, stylized, dark green letter 'G' is positioned behind the company name. The 'G' is thick and has a slight shadow effect, giving it a three-dimensional appearance. It is centered horizontally and partially overlaps the text.

# GREEN

FINANCIAL RESOURCES, LLC

## CONFIDENTIAL CLIENT DATA FORM

*This information is for use in providing recommendations only  
and will not be shared with other parties.*

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*Client Name*

*Date*

*So that we may provide the most thorough review of your situation,  
please include your most recent STATEMENTS, POLICIES, AND  
LAST YEAR'S TAX RETURNS; or bring them with you to our meeting.*

\*All recommendations made are based upon the information provided by you and other information disclosed in discussions. Any failure to provide complete information or to advise of material changes to retirement plans or financial situation may render such retirement planning recommendations invalid.



# INVESTMENTS

**Type:** PS = Passbook Savings; MM = Money Market; TB = Treasury Bills; I = IRA; R = Roth; 4T = Traditional 401K; 4R = Roth 401(k); SI = SEP-IRA; T = TSA or 403B; S = Stock; MF = Mutual Funds; RE = Real Estate Investment Trust; B = Bonds; CD = CDs; O = Other (explain)

\* See back for real estate investments

Type	Company Name	Amount	Beneficiary	Yearly Contributions*

\*If your employer matches any contributions, please list amount along with your contribution

# INSURANCE/ANNUITIES

Please include copies of a recent statement and the original policy or contract.

**Type:** T = Term\*; U = Universal Life; V = Variable Life; VL = Variable Universal Life; W = Whole Life; VA = Variable Annuity; LT = Long-Term Car; DI = Disability; FA = Fixed Annuity

Company Name	Face Amount	Insured	Type	Premium	Loans Against	Monthly Benefit	Beneficiary

# PENSIONS & SOCIAL SECURITY

Client A/B	P/S	Start Year	End Year	Monthly Benefits	Increase? Y/N	Monthly Payments

# REAL ESTATE INVESTMENTS

**Type:** PR = Primary Residence; SR = Secondary Residence; RR = Rental Residential; RC = Rental Commercial;  
 O = Other  
**#:** F = First Mortgage; S = Second Mortgage

Type	#	location	Market Value	Balance	Term	Issue Date	Interest Rate	Monthly Payments	Income

# LIABILITIES/EXPENSES

Item/Company	Balance	Interest Rate	Minimum Payment	Current Payment
Auto 1				
Auto 2				
Auto 3				
Credit Card 1				
Credit Card 2				
Credit Card 3				
Student Loan				
Charitable Giving				
Other				
Overall estimated monthly expenses including all liabilities listed above =				

# OTHER IMPORTANT INFORMATION

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