



**S&D CAPITAL**  
FINANCIAL ADVISORS

**TOLEDO OFFICE**

2467 Woodville Rd, Ste 3  
Oregon, Ohio 43616  
Phone: (419) 693-9000  
Fax: (866) 824-9119

**CLEVELAND OFFICE**

210 Bell Street, Ste 5-R  
Chagrin Falls, Ohio 44022  
Phone: (440) 561-6800  
Fax: (866) 824-9119

**FINDLAY OFFICE**

1995 Tiffin Avenue, Ste 305  
Findlay, Ohio 45840  
Phone: (419) 424-5150  
Fax: (866) 824-9119

**CLYDE OFFICE**

1076 W. McPherson Hwy, Ste 2  
Clyde, Ohio 43410  
Phone: (419) 547-5500  
Fax: (866) 824-9119

**CLIENT FACT FINDER**

**CLIENT INFORMATION:**

Name: \_\_\_\_\_  
 Address: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 DOB: \_\_\_\_\_  
 SSN: \_\_\_\_\_  
 Home Phone: \_\_\_\_\_  
 Cell Phone: \_\_\_\_\_  
 E-Mail: \_\_\_\_\_  
 DL #: \_\_\_\_\_  
 Issue date: \_\_\_\_\_  
 Expiration date: \_\_\_\_\_

**SIGNIFICANT OTHER:**

Name: \_\_\_\_\_  
 DOB: \_\_\_\_\_  
 SSN: \_\_\_\_\_  
 Cell Phone: \_\_\_\_\_  
 E-Mail: \_\_\_\_\_  
 DL #: \_\_\_\_\_  
 Issue date: \_\_\_\_\_  
 Expiration date: \_\_\_\_\_  
 Marital Status:        **S   M   D   W**  
 Anniversary: \_\_\_\_\_

**BUSINESS INFORMATION:**

Employer: \_\_\_\_\_  
 Title: \_\_\_\_\_

**SIGNIFICANT OTHER BUSINESS INFO:**

Employer: \_\_\_\_\_  
 Title: \_\_\_\_\_

**CHILDREN:**

Name	DOB	Social Security	Additional Information

**INCOME SOURCES: (salary, bonus, pension, soc sec, business...)**

Name	Income Source	Amount	Comment



**BUDGET:**    Yes No    Current Monthly Savings \_\_\_\_\_ Desired Monthly Savings \_\_\_\_\_

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**DEBTS: (school loans, credit cards, car loans...)**

Name	Amount	Interest Rate	Payment	Comment

**ASSETS:**

Account Name	Account Type	Current Value	Ownership

**PROPERTY:**

Description	Current Value	Liability	Ownership

**LIFE INSURANCE:**

Do you have life insurance?    Yes No

If Yes:    Death Benefit: \_\_\_\_\_    PremiumAmount: \_\_\_\_\_

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