

# Marquis Wealth Group

## Data Gathering Form

Client

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### F.O.R.M.

#### Family

Spouse:

Children/Grandchildren:

Relatives:

Pets:

Health:

Emergency Contact Person: (name, phone, email, address)

#### Occupation

Background:

Business Owner:

Education/School/Degree

#### Recreation

Rec Interests/Hobbies:

Music:

Reading:

Traditions:

Travel:

Charities/Service Orgs:

#### Money

Business Assets:

Real Estate Assets:

CPA:

Attorney(s):

Other: