

All About You

Thank you for trusting us with your Real Estate needs. The success of my business depends on our ability to make you a raving fan. A raving fan is a client who gladly refers us to all their friends and family. You, our client, are the most important part of our Keller Williams Family. Please take a moment to complete these questions, as they will help us to help you.

Name(s): _____

Birthday(s): _____

E-mail: _____

Children (names and birthdays): _____

Favorite Places for lunch/dinner: _____

Favorite Hobbies/Sports: _____

If we don't have this information from you already, please list your following advisors and rate them on a scale of 1-10, 10 being the best.

Loan Officer Name: _____	Phone: _____	Rate: _____
Financial Planner Name: _____	Phone: _____	Rate: _____
Accountant Name: _____	Phone: _____	Rate: _____
Insurance Agent Name: _____	Phone: _____	Rate: _____
Trust Attorney Name: _____	Phone: _____	Rate: _____

May we contact the above advisors to help serve your needs? Yes No (circle one)

What number would you like us to call for your Wednesday Updates?

What address would we use for delivery purposes?

What method of contact would you prefer: Phone email mail (circle one)

Please confirm your contact information:

Home: _____ co-Home: _____

Cell: _____ co-Cell: _____

Work: _____ co-Work: _____

Email: _____ co-Email: _____