



NEW CLIENT INFORMATION

Today's Date:
Business Name:
Entity Type: <input type="checkbox"/> Sole Proprietorship <input type="checkbox"/> S-Corp <input type="checkbox"/> C-Corp <input type="checkbox"/> LLC <input type="checkbox"/> LLP <input type="checkbox"/> Other _____
Contact Name(s):
Website:
Mailing Address:
City and Zip:
Physical Address: (if different from physical address)
City and Zip:
Office Phone:
Fax Number:
Cell Phone:
Email(s):
Email(s):

What services are you interested in: *(check all that apply)*

- | | |
|--|--|
| <input type="checkbox"/> Tax Planning Strategies
<input type="checkbox"/> Financial/Retirement Planning
<input type="checkbox"/> Investment Planning | <input type="checkbox"/> Insurance – Life/Disability/Long-Term Care
<input type="checkbox"/> College/ Education Planning
<input type="checkbox"/> Other: _____ |
|--|--|

Please tell us how you heard about us: *(check all that apply)*

- | | |
|---|--|
| <input type="checkbox"/> Drove by/Walked in
<input type="checkbox"/> Pink Spots
<input type="checkbox"/> Half Moon Bay Review
<input type="checkbox"/> Coastside Calendar
<input type="checkbox"/> Pacifica Tribune
<input type="checkbox"/> Chamber of Commerce | <input type="checkbox"/> Search Engine (Google, Yahoo, Yelp! Yellow Pages, etc.)
<input type="checkbox"/> Other (Please explain): _____

<input type="checkbox"/> Friends/Family (Please provide name): _____
_____ |
|---|--|

John Parsons is a registered representative with, and securities offered through LPL Financial, Member FINRA|SIPC. Financial Planning offered through Parsons Financial Advisors, a Registered Investment Advisor and separate entity from LPL Financial.