# New Client Profile Form

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| **Personal Information** |  | | | | | |
| Full Legal Name |  | | | | | |
| Preferred Given Name |  | | | | | |
| Date of Birth |  | | | | | |
| Place of Birth |  | | | | | |
| Current Bank & Bank Account number |  | \_ \_ / \_ \_ \_ \_ / \_ \_ \_ \_ \_ \_ \_ / \_ \_ | | | | |
| Personal IRD number |  | | | | | |
| Photo ID provided | Please attach a copy | | | | | |
| **Contact Details** |  | | | | Preferred contact | |
| E-mail address |  | | | |  | |
| Cell phone |  | | | |  | |
| Home phone |  | | | |  | |
| Work phone |  | | | |  | |
| Residential Address |  | | | | | |
| Postal Address |  | | | | | |
| **Employment** |  | | | | | |
| Occupation |  | | | | | |
| Are you self-employed? |  | | | | | |
| Current Employer (if not self-employed) |  | | | | | |
| Are you GST registered? (if yes please provide GST number) |  | | | | | |
| **3rd Party Information** |  | | | | | |
| Current Accountant |  | | | | | |
| Current Mortgage Broker |  | | | | | |
| Current Insurance Broker |  | | | | | |
| Previous Solicitor |  | | | | | |
| **Other information** |  | | | | | |
| Who referred you to us? |  | | | | | |
| You will be included in our newsletters. What areas are you interested in: | Commercial / Business | |  | Wills / Estates | |  |
| Property / Rentals | |  | Relationship Property | |  |
| Employment | |  | Trusts | |  |