# New Client Profile Form

|  |  |
| --- | --- |
| **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  |  |