

Client Questionnaire

Establish Business

Los Angeles HP Office Orange County HP Office Other _____



_____, 2022

DATE



1. BOARD MEMBER INFORMATION

Legal				SSN		
Name	_____ Last,	_____ Frist	_____ Middle	_____ Social Security Number		
Home Address	_____ Street Address		_____ Unit#	_____ City,	_____ State	_____ Zip
Contact Info.	Mobile			<input type="checkbox"/> gmail.com <input type="checkbox"/> yahoo.com <input type="checkbox"/> hotmail.com <input type="checkbox"/> other:		

Legal				SSN		
Name	_____ Last,	_____ Frist	_____ Middle	_____ Social Security Number		
Home Address	_____ Street Address		_____ Unit#	_____ City,	_____ State	_____ Zip
Contact Info.	Mobile			<input type="checkbox"/> gmail.com <input type="checkbox"/> yahoo.com <input type="checkbox"/> hotmail.com <input type="checkbox"/> other:		

Legal				SSN		
Name	_____ Last,	_____ Frist	_____ Middle	_____ Social Security Number		
Home Address	_____ Street Address		_____ Unit#	_____ City,	_____ State	_____ Zip
Contact Info.	Mobile			<input type="checkbox"/> gmail.com <input type="checkbox"/> yahoo.com <input type="checkbox"/> hotmail.com <input type="checkbox"/> other:		

Legal				SSN		
Name	_____ Last,	_____ Frist	_____ Middle	_____ Social Security Number		
Home Address	_____ Street Address		_____ Unit#	_____ City,	_____ State	_____ Zip
Contact Info.	Mobile			<input type="checkbox"/> gmail.com <input type="checkbox"/> yahoo.com <input type="checkbox"/> hotmail.com <input type="checkbox"/> other:		



2. REAL ESTATE INFORMATION

1. Joint Husband
 Sole Wife Other LT ___% interest Purchase Date _____

Residential Current title held _____ Cost Basis _____
 Rental _____ Mortgage _____
 Commercial _____
 Land Street Address _____ Unit# _____ Approx Value _____
 Other _____ City, _____ State _____ Zip _____ APN _____

2. Joint Husband
 Sole Wife Other LT ___% interest Purchase Date _____

Residential Current title held _____ Cost Basis _____
 Rental _____ Mortgage _____
 Commercial _____
 Land Street Address _____ Unit# _____ Approx Value _____
 Other _____ City, _____ State _____ Zip _____ APN _____

3. Joint Husband
 Sole Wife Other LT ___% interest Purchase Date _____

Residential Current title held _____ Cost Basis _____
 Rental _____ Mortgage _____
 Commercial _____
 Land Street Address _____ Unit# _____ Approx Value _____
 Other _____ City, _____ State _____ Zip _____ APN _____

4. Joint Husband
 Sole Wife Other LT ___% interest Purchase Date _____

Residential Current title held _____ Cost Basis _____
 Rental _____ Mortgage _____
 Commercial _____
 Land Street Address _____ Unit# _____ Approx Value _____
 Other _____ City, _____ State _____ Zip _____ APN _____

5. Joint Husband
 Sole Wife Other LT ___% interest Purchase Date _____

Residential Current title held _____ Cost Basis _____
 Rental _____ Mortgage _____
 Commercial _____
 Land Street Address _____ Unit# _____ Approx Value _____
 Other _____ City, _____ State _____ Zip _____ APN _____



3. BANK ACCOUNT INFORMATION

1. Institution

_____	<input type="checkbox"/> Checking	_____	<input type="checkbox"/> Single
Name of Institution	<input type="checkbox"/> Savings	Name on the Account/Title	<input type="checkbox"/> Joint
_____	<input type="checkbox"/> CDs	_____	<input type="checkbox"/> Trust
Account/Certificate Number	<input type="checkbox"/> Money Market	Current Balance	<input type="checkbox"/> Other

2. Institution

_____	<input type="checkbox"/> Checking	_____	<input type="checkbox"/> Single
Name of Institution	<input type="checkbox"/> Savings	Name on the Account/Title	<input type="checkbox"/> Joint
_____	<input type="checkbox"/> CDs	_____	<input type="checkbox"/> Trust
Account/Certificate Number	<input type="checkbox"/> Money Market	Current Balance	<input type="checkbox"/> Other

3. Institution

_____	<input type="checkbox"/> Checking	_____	<input type="checkbox"/> Single
Name of Institution	<input type="checkbox"/> Savings	Name on the Account/Title	<input type="checkbox"/> Joint
_____	<input type="checkbox"/> CDs	_____	<input type="checkbox"/> Trust
Account/Certificate Number	<input type="checkbox"/> Money Market	Current Balance	<input type="checkbox"/> Other

4. Institution

_____	<input type="checkbox"/> Checking	_____	<input type="checkbox"/> Single
Name of Institution	<input type="checkbox"/> Savings	Name on the Account/Title	<input type="checkbox"/> Joint
_____	<input type="checkbox"/> CDs	_____	<input type="checkbox"/> Trust
Account/Certificate Number	<input type="checkbox"/> Money Market	Current Balance	<input type="checkbox"/> Other

5. Institution

_____	<input type="checkbox"/> Checking	_____	<input type="checkbox"/> Single
Name of Institution	<input type="checkbox"/> Savings	Name on the Account/Title	<input type="checkbox"/> Joint
_____	<input type="checkbox"/> CDs	_____	<input type="checkbox"/> Trust
Account/Certificate Number	<input type="checkbox"/> Money Market	Current Balance	<input type="checkbox"/> Other

6. Institution

_____	<input type="checkbox"/> Checking	_____	<input type="checkbox"/> Single
Name of Institution	<input type="checkbox"/> Savings	Name on the Account/Title	<input type="checkbox"/> Joint
_____	<input type="checkbox"/> CDs	_____	<input type="checkbox"/> Trust
Account/Certificate Number	<input type="checkbox"/> Money Market	Current Balance	<input type="checkbox"/> Other