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**Ideal Client Profile** worksheet

DESCRIPTION/INSTRUCTIONS:

*This worksheet is designed to help you put together an* ***Ideal Client Profile****.

Think about your top 10 clients. What are their qualities and attributes?*

*Fill out the worksheet based on the most common qualities that your top 10 clients share.*

*Consolidating the qualities of your top clients in one place will help you to better understand the ideal client for your firm.*

**Ideal Client Profile Worksheet**

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| --- | --- |
| **Client Name:** |  |
|  |  |
| **Category** | **Description** |
| **Investable Assets** |  |
| **Wealth Mgmt. Needs** |  |
| **Age** |  |
| **Marital Status** |  |
| **Primary Decision Maker**  |  |
| **Household Income** |  |
| **Occupation** |  |
| **Education** |  |
| **Special Interests** |  |
| **Personality** |  |
| **Temperament** |  |
| **Investment Style** |  |
| *Other (fill in)* |  |
| *Other (fill in)* |  |
| *Other (fill in)* |  |