

# Client Information Engagement Agreement

Sustainable Advisors Alliance, LLC



## Schedule C – Client Profile

### PRIMARY CLIENT INFORMATION

Name: \_\_\_\_\_  
*Last First M.I. Date of Birth*

Mailing Address \_\_\_\_\_ Apartment/Unit # \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ ZIP Code \_\_\_\_\_ Country of Citizenship \_\_\_\_\_

Same as Mailing Legal Address \_\_\_\_\_ Apartment/Unit # \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ ZIP Code \_\_\_\_\_ Country \_\_\_\_\_

Home / Cell Phone \_\_\_\_\_ Email \_\_\_\_\_

Work Phone \_\_\_\_\_ Work Email \_\_\_\_\_

Occupation / Employer \_\_\_\_\_ SSN or Tax ID \_\_\_\_\_

Annual Household Income: \$ \_\_\_\_\_ Tax Bracket % \_\_\_\_\_ Net Worth: \$ \_\_\_\_\_  
*Excluding Primary Residence*

### SECONDARY CLIENT INFORMATION

Name: \_\_\_\_\_  
*Last First M.I. Date of Birth*

Home / Cell Phone \_\_\_\_\_ Email \_\_\_\_\_

Work Phone \_\_\_\_\_ Work Email \_\_\_\_\_

Occupation / Employer \_\_\_\_\_ SSN or Tax ID \_\_\_\_\_

Relationship to Primary: \_\_\_\_\_ Country of Citizenship \_\_\_\_\_

### CLIENT ACKNOWLEDGEMENT

Initials: \_\_\_\_\_ Date: \_\_\_\_\_ Initials: \_\_\_\_\_ Date: \_\_\_\_\_