PERSONAL INFORMATION PROFILE

1) Name:_____
Company:_____
Title:_____
Years in Position:_____
2) Address: (O) _____
(H) _____
3) Phone: (O) _____ (H) _____
4) Name of Spouse:_____
Anniversary:_____ Employment of Spouse _____
5) Charitable / Social Activities of Spouse:_____
_____
_____
6) Names / Ages of Children:_____
_____
7) Important Activities of Children:_____
_____
8) Brief Description of Business:_____
_____
_____
_____
9) Birthday:_____
10) Name / Location of High School:_____
11) Undergraduate School:_____
12) Graduate School:_____
13) College Fraternity or Sorority:_____
14) Honors and Extracurricular Activities:_____
_____
_____
15) Military Service:_____ Branch:_____
Rank Achieved:_____ Length of Service:_____
Where Stationed:_____
16) Parent(s) Occupation(s) Father:_____
Mother:_____
17) Hometown:_____
18) Hobbies:_____
_____
_____
_____
(Include details as to how active the individual is, how important the hobby is in their life, and show how accomplished they are.)
19) Organizational Activities:_____
Service Clubs:_____
Leadership Positions:_____

Charities:_____

Leadership Positions:_____

20) Religious Affiliation:_____

Leadership Positions:_____

21) Political Affiliation:_____

Political Activities:_____

22) Name of Office Manager:_____

23) Background Summary of Office Manager:_____

_____

_____

24) Names of Other Key Office Personnel:_____

_____

25) Background Summary of Key Office Personnel:_____

_____

_____

26) Preferred Time to Accept Calls:_____

To Schedule Office Visits:_____

27) Enjoyment of Work:_____

_____

_____

28) Name(s) of Best Friend(s):_____

_____

29) Personal Hero(s):_____

30) Major Goal in Life:_____

_____

(With some this will be difficult to determine because most won't have such a goal. Others will be very private about the information, however, if you can get this information, you will take a giant step toward developing developing a solid relationship with the client.)

31) Primary Accomplishments:_____

_____

32) Disappointments or Tragedies:_____

_____

33) Greatest Strengths:_____

_____

34) Greatest Weaknesses:_____

_____

(The above two responses should be based on input received and on your own impressions.)

35) Pet Peeves:_____

_____

36) Personal Habits:_____

Drinker:_____ Smoker:_____

Favorite Foods:_____

Favorite Restaurants:_____

37) Medical Problems:_____

38) Type of Pet(s):_____

39) Make of Automobile(s):_____

_____

40) Relatives or Close Friends of the Client who are Friends, Associates, or Competitors of Mine:_____

_____

41) Description of items on desk or wall of office:_____

_____

_____

_____

42) Anything unusual about literature in waiting room:_____

_____

_____

_____

43) Responds to Visual Aids:_____

_____

_____

_____

_____

(This should be based on your actual experience with the client and would reflect a description of what aids you used, the client's reaction and the circumstances.)

44) Previous Employment:_____

_____

_____

_____

45) Referred by:_____

46) Referred me to:_____

_____

_____

_____

_____

47) Favorite Vacation Sites and Activities:_____

_____

_____

_____

48) Favorite Sport Teams:_____

_____

49) Miscellaneous Information:_____

_____

_____

(This serves as a catch-all for any information acquired which does not fit into any of the previous headings.)

*You can add to, delete from, or amend this form in any way you see fit, to match the business or industry of your clients. The key is to use some type of form which is standardized and which can be referred to readily. Continue to add information as you gather it, and always remember to review the form before every visit with the client. Keep notes on each meeting, the product presented, and the client's reaction, but those notes should be kept in your call book and are not normally made a part of the personal profile.