

CLIENT INFORMATION

HELP US GET TO KNOW YOU:

Names: _____
Address: _____
Home Phone: _____ Work Phone: _____ Cell Phone: _____
Social Security No.: _____

Names: _____
Address: _____
Home Phone: _____ Work Phone: _____ Cell Phone: _____
Social Security No.: _____

Children: Names: Age: Whose:

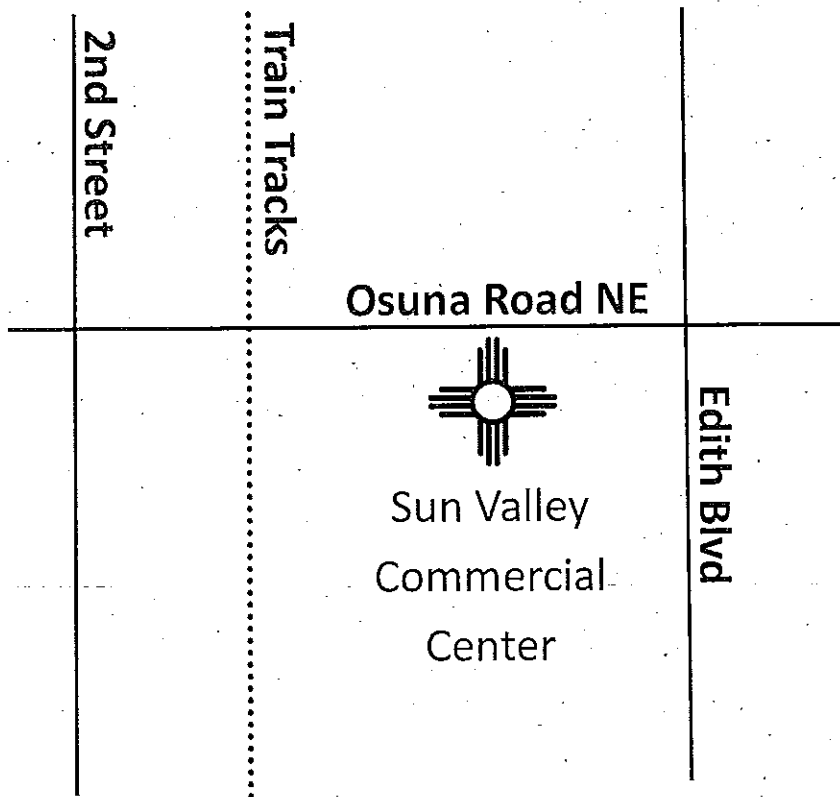
Are you a US Citizen? Yes _____ No _____

FINANCIAL INFORMATION: (Please list the approximate value of the following assets):

Checking Accounts \$ _____
Savings Accounts \$ _____
Certificates of Deposit \$ _____
IRAs \$ _____
Stocks, Bonds, Other Securities \$ _____
Retirement Plans \$ _____
Residence \$ _____
Other NM Real Estate \$ _____
Real Estate outside NM \$ _____
Business Interests \$ _____
Life Insurance \$ _____
Annuities \$ _____
Vehicles \$ _____
Estimated Liabilities \$ _____

Estimated Value of Estate \$: _____

Please let us know if there is any other information you would like us to know:



Kenneth C. Leach & Associates, P.C.

320 Osuna Road NE,
Suite G-4
Albuquerque NM 87107
(505) 883-2702



Directions From the North

Take I-25 South. Take Exit 231 toward Ellison-San Antonio/Osuna. Merge onto Pan American Frontage Road S. Slight right to stay on Pan American Frontage Road S. Take the 2nd right onto Osuna Road NE. Go through the light at Edith Blvd NE and turn left into the Sun Valley Commercial Center. We are located in building G, second floor, Suite G-4.

From the South

Take I-25 North. Take exit 230 toward San Mateo Blvd/Osuna Road. Merge onto Pan American Frontage Road N. Turn left onto San Mateo Blvd NE. Continue onto Osuna Road NE. Go through the light at Edith Blvd NE and turn left into the Sun Valley Commercial Center. We are located in building G, second floor, Suite G-4.

From the East

Take I-40 West/Albuquerque. Take exit 159C to merge onto I-25 N toward Santa Fe. Take exit 230 toward San Mateo Blvd/Osuna Road. Merge onto Pan American Frontage Road N. Turn left onto San Mateo Blvd NE. Continue onto Osuna Road NE. Go through the light at Edith Blvd NE and turn left into the Sun Valley Commercial Center. We are located in building G, second floor, Suite G-4.

From the West

Take I-40 East/Albuquerque. Take exit 159C to merge onto I-25 N toward Santa Fe. Take exit 230 toward San Mateo Blvd/Osuna Road. Merge onto Pan American Frontage Road N. Turn left onto San Mateo Blvd NE. Continue onto Osuna Road NE. Go through the light at Edith Blvd NE and turn left into the Sun Valley Commercial Center. We are located in building G, second floor, Suite G-4.