



ADVENT PARTNERS

ADVENT PARTNERS is an independent practice of **thrivent**

Name _____

Date _____

PERSONAL AND FINANCIAL UPDATE

	Client 1	Client 2 (if answer differs from spouse)
Names of children & their spouses, grandchildren and/or other dependents (please list relationship)		
Anniversary		
Preferred Email Address(s)		
Preferred Phone		
Preferred Method of Communication (Phone/Email)		
Occupation & Employer (if applicable)		
Tax Advisor		
Attorney		
Other Advisors		
Hobbies & Interests		
Favorite Charities or Causes		

Continue on back if additional space is needed →

Certain Advisory Persons of Thrivent provide advisory services under a practice name or “doing business as” name and may have their own legal business entities. However, advisory services are engaged exclusively through Thrivent Advisor Network, LLC, a registered investment adviser. Advent Partners and Thrivent Advisor Network, LLC are not affiliated companies. Information in this message is for intended recipient[s] only. Please visit our website www.adventpartnersfp.com, for important disclosures.

Securities offered through Purshe Kaplan Sterling Investments (“PKS”). Member FINRA/SIPS. PKS is headquartered at 80 State Street, Albany, NY 12207. PKS and Advent Partners are not affiliated companies.