

# SWOT

Client Name

Date

REFERRED BY:

AUM: \$

LEAD ADMIN:

AUA: \$

START DATE:

12 MOS TRAILING REVENUE: \$ AUM ROI: % AUA ROI: %

INVESTOR 360

SIGNED UP \_\_\_\_\_

USES OFTEN \_\_\_\_\_

Financial Plan (Date of Last Plan):

CLIENT EVENTS ATTENDED 2016 AND 2017:

TICKET USE:

CLIENT OF PAA:

CLIENT OF TPLF:

MULTIGENERATIONAL: Yes or No (explanation if necessary)

STRENGTHS	WEAKNESSES
OPPORTUNITIES	THREATS