

# Bio Questionnaire



**Instructions:** Please complete the following biographical information questionnaire. The information you provide will be used in your firm's marketing communication materials (e.g., website, print collateral). While you do not need to answer every question, the more information you provide, the more informative and engaging your bio will be.

## GENERAL INFORMATION

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First name: \_\_\_\_\_ Middle initial: \_\_\_\_\_ Last name: \_\_\_\_\_

Title: \_\_\_\_\_ Office phone: \_\_\_\_\_

Email address: \_\_\_\_\_ Cell (optional): \_\_\_\_\_

## CAREER INFORMATION

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What are your current job responsibilities and duties?

What are your professional specialties or areas of expertise?

Briefly describe your ideal client:

Years of relevant experience: \_\_\_\_\_

Description of your relevant experience:

What inspired you to pursue your current career?

What do you enjoy most about your role?

What has been your most satisfying career moment?

What is the best piece of financial advice you've ever received?

Why do you enjoy working with your clients?

EDUCATIONAL BACKGROUND

EDUCATIONAL INSTITUTION	DEGREE/CERTIFICATE	FIELD OF STUDY	YEAR EARNED

PROFESSIONAL DESIGNATIONS AND LICENSES

MEMBERSHIPS/COMMUNITY INVOLVEMENT

Please list any professional associations to which you belong (include information about leadership roles):

Please describe any volunteerism with charitable or community organizations (include information about leadership roles):

PERSONAL INFORMATION

City of residence: \_\_\_\_\_

SPOUSE/PARTNER	AGE
CHILDREN	AGE
GRANDCHILDREN	AGE

Hobbies and passions:

What is one thing people would be surprised to learn about you?

Please share at least one of your "favorites" (book, food, travel destination, TV show, etc.):

#### **OTHER INFORMATION**

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Please share any additional information you'd like us to include in your bio: