

Know Your COI Worksheet

Pets:

COI:

COI Spouse:

Pets:

Children & Grandchildren:

Mutual Clients:

Other Professionals (Estate Attorney, CPA, Mortgage Broker, etc.):

Colleagues:

Referrals Sent:

Referrals Received:

Surprise & Delight:

COI Visit Our Office:

Social Activity:

Social Media/Internet:

- ☐ Connect on LinkedIn
- ☐ Connect on Facebook
- ☐ Social Media Introduction Discussion
- ☐ Teach LinkedIn
- ☐ Conduct a Google Search
- ☐ Visit Company Website

Important Dates (Birthday, Wedding, etc.):



Recreational Activities / Hobbies:



Favorite Sports Teams:



Favorite Restaurants/Foods:



Vacation Habits:



Volunteer Work / Charity Involvement:



Health/Medical History:



Preferred Beverages (Alcoholic & Non-Alcoholic):



Social Clubs and Organizations:



Political Interests:



Exercise Habits:



Alma mater:

