Your data sheet

To advise you well, I need a few details about you and your family.

1. ABOUT YOU

Title

☐ Mr ☐ Ms ☐ Diverse

Academic title

First name

Last name

Date of birth (DD.MM.YYYY)

Place of birth

Nationality

Marital status

ADDRESS AND CONTACT

Street and house number

Postcode

City

Email

Phone / mobile

Living situation

Driving licence since (year)

2. FAMILY

Partner

First name

Last name

Date of birth (DD.MM.YYYY)

Occupation

Children

Child 1: first name	Last name	Date of birth
Child 2: first name	Last name	Date of birth
Child 3: first name	Last name	Date of birth
Child 4: first name	Last name	Date of birth

3. WORK AND INCOME

Employment status

Occupation / job

Employer / company

Working there since (MM.YYYY)

Gross income per year (€)

Net income per month (€)

How much of your working time do you spend at a desk?

Health insurance: you are insured …

With which insurer / health fund?

4. BANK DETAILS

A direct debit only happens with a separate SEPA mandate for each contract.

Account holder

Bank

IBAN

5. HEALTH

Is there anything about your health that we should talk about?

For example ongoing treatment, a pre-existing condition or regular medication. This only matters for some insurances (disability, accident, life). You don't need to give any details here.

☐ Yes, please ask me ☐ No

6. FINISH

Is there anything else you'd like to tell me? (please no health details)

☐ I agree that Eduard Kaiser stores my details – including my answer about health – and uses them to advise me on and arrange insurance. I can withdraw this consent at any time.
More: kaiserlichberaten.de/en/datenschutz.html

How to send the sheet to me

Fill it in on your computer, save it and email it to info@kaiserlichberaten.de – or print it and post it to Burckhardtstraße 2, 01307 Dresden, Germany. The most secure way is the encrypted online form: **kaiserlichberaten.de/en/datenbogen.html**