
Acct # _____

OFAC by _____

Description of 1st Tran _____

Dividend (H/S/RD) _____

Other Special Instructions _____



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Clayton, MO 63105-3702
314-727-1177 - 800-292-6637
www.cfii.org

How was account acquired?
 Walk-In / Phone-In
 Advertising _____
 Personal Friend _____
 Related Acct _____
 Referred By _____
 Other (Specify) _____

ACCT. TYPE: IND JOINT TEN CUST TR RETIREMENT ACCT OTHER _____

PLEASE FILL-OUT COMPLETELY, SIGN, DATE AND RETURN FORM TO OUR OFFICE

YOUR SELF:

OTHER : (PLEASE SPECIFY)

Name _____

Name _____

Address _____

Address _____

City _____

City _____

State & Zip Code _____

State & Zip Code _____

Date of Birth (M/D/Y) _____

Date of Birth (M/D/Y) _____

Tax ID# (Tax ID#, SSN, ITIN) _____

Tax ID# (Tax ID#, SSN, ITIN) _____

ID Type & ID Issuer _____

ID Type & ID Issuer _____

ID # _____

ID # _____

Citizen of U.S.A. YES NO (If answer no specify) _____

Citizen of U.S.A. YES NO (If answer no specify) _____

Home # _____

Home # _____

Work # _____

Work # _____

Fax # _____

Fax # _____

E-Mail Address _____

E-Mail Address _____

Occupation _____

Occupation _____

Employers Name _____

Employers Name _____

Address _____

Address _____

Years Employed _____

Years Employed _____

Marital Status: Single _____ Married _____

Marital Status: Single _____ Married _____

Divorced _____ Widowed _____

Divorced _____ Widowed _____

No. of Dependents _____

No. of Dependents _____

Home: Own _____ Rent _____

Home: Own _____ Rent _____

Primary Bank _____

Primary Bank _____

Annual Income _____

Annual Income _____

Net Worth _____

Net Worth _____

Liquid Net Worth _____

Liquid Net Worth _____

Source of Income _____

Source of Income _____

Account w/other Firm? YES NO _____

Account w/other Firm? YES NO _____

Type of Investment Experience _____

Type of Investment Experience _____

How Long Have You Been Investing? _____

How Long Have You Been Investing? _____

Investment Objectives Mark "P" for Primary and "S" for Secondary

US Federal Tax Rate: 0% <- 28%

Growth Income Preservation of Capital

29-34% --> 35%

Speculation Trading Profits

1. I certify that the information on this page is accurate and complete. I do do not want my name, address & security position released to requesting companies in which I hold securities. I understand that if I do not indicate my choice, my name, address & security position will be released.
2. You, or your clearing firm may charge and collect from my account any fees that you establish in connection with the services that you provide including but not limited to retirement account, account transfer and annual service fees. I understand I must pay in full any debts I owe you, including interest.

Signature _____ Date _____

Signature _____ Date _____