

_____ Acct # _____
 OFAC by _____ Description of 1st Tran _____
 Dividend (H/S/RD) _____
 Other Special Instructions _____



Consolidated Financial Investments, Inc.
 222 North Meramec Avenue
 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:

Name _____
 Address _____
 City _____
 State & Zip Code _____
 Date of Birth (M/D/Y) _____
 Tax ID# (Tax ID#, SSN, ITIN) _____
 ID Type & ID Issuer _____
 ID # _____
 Citizen of U.S.A. YES NO (If answer no specify) _____
 Home # _____
 Work # _____
 Fax # _____
 E-Mail Address _____
 Occupation _____
 Employers Name _____
 Address _____
 Years Employed _____
 Marital Status: Single _____ Married _____
 Divorced _____ Widowed _____
 No. of Dependents _____
 Home: Own _____ Rent _____
 Primary Bank _____
 Annual Income _____
 Net Worth _____
 Liquid Net Worth _____
 Source of Income _____
 Account w/other Firm? YES NO _____
 Type of Investment Experience _____
 How Long Have You Been Investing? _____
 Investment Objectives **(Rank in order of preference)**
 ___ Preservation of Capital ___ Tax Favored Income ___ Income ___ Income & Growth
 ___ Long-Term Growth ___ Short-Term Growth ___ Speculation

OTHER : (PLEASE SPECIFY)

Name _____
 Address _____
 City _____
 State & Zip Code _____
 Date of Birth (M/D/Y) _____
 Tax ID# (Tax ID#, SSN, ITIN) _____
 ID Type & ID Issuer _____
 ID # _____
 Citizen of U.S.A. YES NO (If answer no specify) _____
 Home # _____
 Work # _____
 Fax # _____
 E-Mail Address _____
 Occupation _____
 Employers Name _____
 Address _____
 Years Employed _____
 Marital Status: Single _____ Married _____
 Divorced _____ Widowed _____
 No. of Dependents _____
 Home: Own _____ Rent _____
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 Annual Income _____
 Net Worth _____
 Liquid Net Worth _____
 Source of Income _____
 Account w/other Firm? YES NO _____
 Type of Investment Experience _____
 How Long Have You Been Investing? _____

1. I certify that the information on this page is accurate and complete. I 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 _____