

# CEERA INVESTMENTS, LLC

## CLIENT INFORMATION SHEET

NAME

▶ ARE YOU AN "INSIDER" FOR ANY PUBLICLY TRADED COMPANY?

NO                       YES

If Yes,

COMPANY	TYPE OF "INSIDER"

▶ CURRENT TAX BRACKET

10%                       15%                       25%                       28%                       33%                       35%  
 Other \_\_\_\_\_

▶ FINANCIAL INFORMATION (Joint A/cs on a combined basis)

Annual Income:                       \$0-\$24,999                       \$25,000-\$49,999                       \$50,000-\$99,999                       \$100,000-249,999                       \$250,000+  
 Approximate Net Worth:                       \$0-\$14,999                       \$15,000-\$49,999                       \$50,000-\$99,999                       \$100,000-\$249,999                       \$250,000-499,999  
*(Not incl residence)*                       \$500,000-999,999                       \$1,000,000-1,999,999                       \$2,000,000+  
 Approximate Liquid Net Worth:                       \$0-\$14,999                       \$15,000-\$49,999                       \$50,000-\$99,999                       \$100,000-\$249,999                       \$250,000-499,999  
*(Cash, Stocks, etc.)*                       \$500,000-999,999                       \$1,000,000-1,999,999                       \$2,000,000+

▶ OTHER INFORMATION

No. of dependents \_\_\_\_\_

▶ ANY RESTRICTIONS, DOs & DON'Ts WHILE MANAGING YOUR INVESTMENTS?

▶ ANY OTHER INFORMATION THAT YOU THINK WE SHOULD BE AWARE OF?  
*(Such as plans to retire, an expected inheritance, an expected withdrawal or contribution of funds, any serious illnesses, etc.)*

SIGNATURE

DATE