



CLIENT INFO 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 _____

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

▶ ANY OTHER INFORMATION THAT YOU THINK WE SHOULD BE AWARE OF?

SIGNATURE DATE