

# Your Profile



Name: \_\_\_\_\_

Honorific: Mr.  Mrs.  Miss  Ms.  Dr.

Citizenship: U.S.  Resident alien

Non-resident alien; Country: \_\_\_\_\_

Date of birth \_\_\_\_\_

State of birth \_\_\_\_\_

Driver's license number \_\_\_\_\_

Driver's license state \_\_\_\_\_

Street address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Phone (H) \_\_\_\_\_

Phone (W) \_\_\_\_\_

Phone (C) \_\_\_\_\_

Email address (H) \_\_\_\_\_

Email address (W) \_\_\_\_\_

How do you prefer to be contacted? \_\_\_\_\_

Employment status:  Employed  Self-employed  
 Not employed (unemployed, retired, student, minor)

Occupation \_\_\_\_\_

Investment experience:  0 - 5 years  6 - 10 years  
 11 + years

Tax filing Status:  Single  Head of household  
 Married filing jointly  Married filing separately

\*This information will not be used without your permission.