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1. Personal Information

Full Name

Social Security Number

Date of Birth

Home Address (No PO Boxes)

City

State

Zip

Mobile Phone

Email

Are you a U.S. Citizen? Yes No

Are you a director, shareholder, or executive who makes policy at a public company? Yes No

If "Yes", provide the company name and trading symbol

Are you or an immediate family member a politically exposed person? Yes No

Are any beneficial owners, their spouses, or any other immediate family members, including parents, in-laws, and siblings that are dependents, employed by or associated with the securities industry (for example, investment advisor, sole proprietor, partner, officer, director, branch manager or broker at a broker-dealer firm or municipal securities dealer) or a financial regulatory agency, such as FINRA or the New York Stock Exchange?

If yes, and if this entity requires that the client obtains its approval to open this account, select the Yes checkbox:

Yes No

2. Source of Wealth

Employment Status	Full time Employed	Part time Employed	Self Employed
	Unemployed	Retired	

Select your source(s) of wealth (required)

Employment	Retirement/Pension	Inheritance/Gift
Assets	Divorce	Legal Settlement
Partner/Spouse	Parental Support	Personal Investments
Lottery/Gaming	Entrepreneur	Government Benefits

Employment Information (only required if source of wealth is “Employment” or “Entrepreneur”)

Employer Name	Annual Income
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Country of workplace	Employer line of Business
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Asset Details (only required if source of wealth is “Assets”)

Type of asset

Personal Investments Details (only required if source of wealth is “Personal Investments”)

Type of Investment

Entrepreneur Details (only required if source of wealth is “Entrepreneur”)

Company Name

Line of Business

Signature

Date (MM/DD/YYYY)