

Client Information Form

To Update or Add Information

Questions or Need Assistance?

Call (909) 738-4000 or email info@bfcalf.org



THE BAPTIST
Foundation
OF CALIFORNIA™

1. Client Information

Adding New Client **Updating Current Client Information**

Name

Additional Owner/Authorized Individual Name

Legal/Residential Address *This is your legal address used for tax reporting and may not be a PO Box*

Mailing Address *This is where you would like statements and other correspondence to be sent. This address may be a PO Box*

Same as Legal/Residential Address

Address

Address

Address Line 2

Address Line 2

City, State, Zip

City, State, Zip

Phone Number:

Email Address:

() -

Daytime Phone Number

Email Address

() -

Alternate Phone Number

Alternative Email Address

2. Signature(s)

By signing below, you certify that all information provided is correct to the best of your knowledge.

Signature

Signature

Name of Authorized Signer (please print)

Name of Authorized Signer (please print)

Date

Date

Deliver Form to:

Email: info@bfcalf.org (preferred)

Mail: The Baptist Foundation of California, 3210 E. Guasti Road, Ste 640, Ontario, CA 91761

For Foundation Use Only

Related Account(s):

Related Individual(s):

Relationship Type:

Trustor

Grantor

Beneficiary

Tax Professional/Financial Advisor

Other: _____