



Investor Profile

OFFICE: 248.378.1200
 TF: 855.578.1200
 FAX: 248.378.1201
 WWW.GREATLAKESWEALTH.US
 22260 Haggerty Rd, Suite 160
 Northville, MI 48167

You Name _____

Date of Birth _____ Social Security # _____

Currently working? Y N Age you plan to retire _____

Employer: _____

Job Title: _____

Home Address: _____

Email: _____

Phone #: _____

Social Media: Y N Y N

Marital Status: Married Single Divorced Widowed

Joint Owner Name _____

Date of Birth _____ Social Security # _____

Currently working? Y N Age you plan to retire _____

Employer: _____

Job Title: _____

Home Address: _____

Email: _____

Phone #: _____

Social Media: Y N Y N

Marital Status: Married Single Divorced Widowed

Top Financial Goals:

Please rank your objectives in order of importance (Highest = 1) using the six objectives listed.

___ Preservation of Capital ___ Trading Profits

___ Speculation ___ Capital Appreciation

___ Income ___ Growth and Income

Income: \$ _____

Joint Owner Income: \$ _____

Liquid Assets: \$ _____

Net Worth: \$ _____

Where Assets Are Currently Held: _____

Your Risk Number is

Beneficiaries — Primary

Name: _____

Relationship: _____

Percentage: _____

Name: _____

Relationship: _____

Percentage: _____

Contingent

Name: _____

Relationship: _____

Percentage: _____

Name: _____

Relationship: _____

Percentage: _____

ACH Information

Bank Name: _____

Routing Number: _____

Account Number: _____

Checking Savings

Citizenship

*If not a U.S. citizen, passport is required

U.S. Citizen Alien

Nationality: _____