



Information Needed to Open Your Account

Please fill out this information. Mail to the BFG office address: 1695 State Highway 169, Plymouth, MN 55441 or email to: info@bergerfinancial.com and have the word "secure" in the subject line.

If you have any questions, please call or email our office.

Primary Investor Information

First Name

Middle Name

Last Name

Social Security Number

Date of Birth mm/dd/yyyy

Driver's License Number

Driver's License Issue Date

Driver's License Expiration Date

Email Address

Legal Address

City/State

Zip Code

Primary Phone Number

Secondary/Cell Phone Number (optional)

Marital Status (check one) Single Married Domestic Partner Widowed

Citizenship (check one) U.S. Citizen Resident Alien Non-Resident Alien (W-8 Required)

Primary Investor Employment Information

Employment Status (check one) Employed Self-employed Retired
 Homemaker Student Unemployed

Occupation

Employer Name

Employer Address

City/State

Zip Code

Business Phone Number

Household Financial Information

Annual Income

Tax Bracket

Approximate Net Worth

Net Investable Assets

(all accounts, bank, retirement, etc. excluding home)

Time Horizon & Liquidity Needs

Account Time Horizon

0-2 Year

2-5 Years

5-10 Year

10+ Years

Annual Expenses

Special Expenses

(new car or home purchase, remodel, education, medical expenses, etc.)

Special Expense Time Horizon

0-2 Year

2-5 Years

5-10 Year

10+ Years

Risk Tolerance & Primary Investment Objective

Risk Tolerance (check one)

Conservative

Moderate-Conservative

Moderate

Moderate-Aggressive

Aggressive

Investment Objective (check one)

Current Income

High Current Income

Growth and Income

Growth

Investment Experience

Please use the following number to signify experience in the following categories:

1=None, 2=Occasional, 3=Freqent, 4=Extensive

___ Stocks

___ Bonds

___ Real Estate

___ Insurance/Annuities

___ Options

___ Commodities

___ Mutual Funds

___ REITs/DPPs/LPs

___ Other

Financial Holdings

Please list the approximate dollar value of your investment assets that will be held **outside of Berger Financial Group** in the following categories:

None

\$ _____ Stocks

\$ _____ Bonds

\$ _____ Mutual Funds

\$ _____ Real Estate

\$ _____ Options

\$ _____ Insurance/Annuities

\$ _____ REITs/LPs

\$ _____ Commodities

\$ _____ Other

Berger Financial Group, Inc.

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