



JEFF WHITE CFP

retirement-coach

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To make your life a bit more convenient.

Beginning a new investment program requires the completion of several forms. Many of the forms require the same information to be completed. In order to have more time at our meeting to address your questions (instead of completing forms), we'll complete all required forms in advance if you'll take a minute now and provide the following information. *All information remains confidential and will not be disclosed without your consent.*

Full Legal Name:

First

Middle Initial

Last

Social Security Number: _____

_ Date of Birth: _____

Residence Address:

Street Address

City

State

Zip Code

Mailing Address:

Street Address

City

State

Zip Code

Home Phone: _____

Work Phone: _____

Cell/Pager/Other: _____

Email Address: _____

Fax: _____

Employer: _____

Job Title: _____

Employer Address _____

Street Address

City

State

Zip Code

____ / ____ / ____
Date of Hire

Marital Status

Married: _____

Single: _____

\$

of Exemptions

Current Pay - Hourly _____ or Annually _____

Fed: _____ State: _____

U.S. Citizen (Y/N) _____

Driver's License or other Government Issued ID:

Type: _____ ID#: _____ Exp. Date: ____ / ____ / ____

Have you previously invested before? (Y/N) _____ If so, how many years experience do you have investing in each of the following kinds of investments?

Mutual Funds

Annuities

Stocks

Bonds

Margin

Partnerships

Please fax completed form to my office at **(808) 395-0225**. Mahalo for your time!