

New Account Data Form

General Information

Name: _____

Birthdate: _____ Social Security#: _____

Mobile: _____ Work Number: _____

Email: _____ Work Email: _____

Address: _____

Employer: _____ Occupation: _____

DL Number: _____ Issue Date: _____ Exp. Date: _____

Married
 Single/Divorced/Widow
 Domestic Partner

Primary Beneficiary Information

Name	Relationship	Date of Birth	Social Security Number	Percentage (total 100%)
Address: _____				
Address: _____				
Address: _____				

Contingent Beneficiary Information (Optional)

Name	Relationship	Date of Birth	Social Security Number	Percentage (total 100%)
Address: _____				
Address: _____				

Financial Information

Annual Incomeⁱ

(From all sources)

- \$25,000 and under
- \$25,001 - \$50,000
- \$50,001 - \$100,000
- \$100,001 - \$250,000
- \$250,001 - \$500,000
- \$500,001 +

Net Worthⁱⁱ

(Excluding your residence)

- \$50,000 and under
- \$50,001 - \$200,000
- \$200,001 - \$500,000
- \$500,001 - \$1,000,000
- \$1,000,001 - \$3,000,000
- \$3,000,001 - \$10,000,000

Liquid Net Worthⁱⁱⁱ

(After proposed transaction)

- \$50,000 and under
- \$50,000 - \$200,000
- \$200,001 - \$500,000
- \$500,001 - \$1,000,000
- \$1,000,001 - \$3,000,000
- \$3,000,001 - \$10,000,000

Federal Tax Rate

(Highest marginal)

- 0-15%
- 16-25%
- 26-30%
- 31-35%
- over 35%

Return these forms to Lindsey Patten:

lindsey@securefutureadvisor.com

937-853-7533 (Fax)

Secure Future Advisors

4489 Far Hills Avenue

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ⁱ **Annual income** includes income from sources such as employment, alimony, social security, investment income, etc.

ⁱⁱ ***Net Worth** is the value of your assets minus your liabilities. For purposes of this form, assets include stocks, bonds, mutual funds, other securities, bank accounts, and other personal property. Do not include your primary residence among your assets. For liabilities, include outstanding loans, credit card balances, taxes, etc. Do not include your mortgage.

ⁱⁱⁱ **Liquid Net Worth** is your net worth minus assets that cannot be converted quickly and easily into cash, such as real estate, business equity, personal property and automobiles, expected inheritances, assets earmarked for other purposes, and investments or accounts subject to substantial penalties if they were sold or if assets were withdrawn from them.

Personal and Confidential

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