SINGLETON FINANCIAL

CLIENT INFORMATION			
Name			
SSA Number			
Date of Birth			
Cell Phone			
Home Phone			
Work Phone			
Email			
Driver License No.			
Issue Date		Exp Date	
Employment		Occupation	
Employer Name			
Employer Address			
Beneficiary of Spouse Account?			
Beneficiary Type		Beneficiary %	

SPOUSE INFORMATION			
Name			
SSA Number			
Date of Birth			
Cell Phone			
Home Phone			
Work Phone			
Email			
Driver License No.			
Issue Date		Exp Date	
Employment		Occupation	
Employer Name			
Employer Address			
Beneficiary of Client Account?			
Beneficiary Type		Beneficiary %	

ARE YOU, YOURE SPOUSE, OR ANY OTHER FAMILY MEMBERS . . .

______________ A political officer?

______________ Employed by or associated with the securities industry?

______________ A director, 10 percent shareholder, or policy-making officer of a publicly traded company?

______________ A senior military, governmental, or political official of a non-U.S. country?

ADDRESSES

Home Address		Mailing Address	

DEPENDENTS/BENEFICIARIES

(1) Name			
SSA Number			
Date of Birth			
Beneficiary?		Type of Ben.	
		Beneficiary %	

(2) Name			
SSA Number			
Date of Birth			
Beneficiary?		Type of Ben.	
		Beneficiary %	

(3) Name			
SSA Number			
Date of Birth			
Beneficiary?		Type of Ben.	
		Beneficiary %	

(4) Name			
SSA Number			
Date of Birth			
Beneficiary?		Type of Ben.	
		Beneficiary %	

FINANCIAL INFORMATION

Referes to ☐ Primary Investor ☐ Primary & Jont Investor ☐ Joint Investor or Minor

Annual Income ☐ < $20,000 ☐ $20,000-$50,000 ☐ $50,000-$100,0000 ☐ $100,000-$200,000 ☐ $200,000-$500,000 ☐ > $500,000

Net Worth *Total assets minis total liabilites, exluding primary residence, but including all other personal holdings*

☐ < $50,000, must specify: $ ________ ☐ $50,000-$100,000 ☐ $100,000-$250,000 ☐ $250,000-$500,000 ☐ $500,000-$1 million

☐ $1-$2 million ☐ > $2 million, must specify: $ ________

Federal Tax Bracket ________

Net Investable Assets ________ *(sum of all investable assets, including outside holdings, minus liabilities, on these assets)*

RISK TOLERANCE AND PRIMARY INVESTMENT OBJECTIVE

Please select the one objective below that would best descrive your risk tolerance and investment objective for this registration type and/or account(s).

Conservative	Moderate-Conservative	Moderate	Moderate-aggressive	Aggressive
☐ Current Income	☐ Current Income	☐ Current Income	☐ Current Income	☐ Current Income
☐ High Current Income	☐ High Current Income	☐ High Current Income	☐ High Current Income	☐ High Current Income
☐ Growth & Income	☐ Growth & Income	☐ Growth & Income	☐ Growth & Income	☐ Growth & Income
☐ Growth	☐ Growth	☐ Growth	☐ Growth	☐ Growth

SECONDARY INVESTMENT OBJECTIVE

If appropriate, please select up to two secondary investment objectives that coincide with any additional investments for this registration type and /or account(s). These choices will allow for additional investments outside of the primary objective identified above, assuming that the value of these investments do not move the entire portfolio out of the range suggested by the primary investment objective identified above.

☐ Current Income ☐ High Current Income ☐ Growth and Income ☐ Growth ☐ Speculation

TIME HORIZON AND LIQUIDITY NEEDS

Account Time Horizon ☐ 0-2 Years ☐ 2-5 Years ☐ 5-10 Years ☐ 10+ Years

Annual Expenses ________ (recurring - might include mortgage payments, rent, long-term debts, utilities, alimony or child support payments, etc.)

Estimated Special Expenses $ - (future, non-recurring - might include home purchase, home remodel, car purchase, education, medical expense, etc.)

Special Expenses Time Frame ☐ 0 Years ☐ 1-2 Years ☐ 2-5 Years ☐ 5+ Years

INVESTMENT EXPERIENCE

Use one number to signify investment experience for each investment category: 1 - None 2 - Occasional 3 - Frequent 4 - Extensive

	Stocks		Commodities		Insurance/Annuities
	Bonds		Real Estate		REITs
	Options		Mutual Funds		Other

Please list current holdings ***outside*** Cambridge. For insurance/annuities, please use cash value. If there is no outside assets, mark None. For real estate investments, please do not include residence.

☐ None

Stocks	$	Bonds	$	Options	$
Commodities	$	Real estate	$	Mutual Funds	
Insurance/Annuities	$	REIT/DPP/LP	$	Cash/Bank Products	
Unspecified	$	Interval Funds	$	Other	$