

## Confidential Client Profile

<b>Name</b>			
<b>Date of Birth (DOB)</b>			
<b>Home Address</b>			
<b>Phone Numbers</b>	<b>H:</b>	<b>C:</b>	<b>W:</b>
<b>Email Addresses</b>			
<b>Bank Account Number (optional)</b>			
<b>Social Security Number</b>			
<b>Marital Status</b>			
<b>Number of Dependents</b>			
<b>Security Question Answer</b>			
<b>Annual Net Income</b>			
<b>Source of Income</b>			
<b>Total Assets</b>			
<b>Net Worth</b>			
<b>Liquid Net Worth</b>			
<b>Job Title</b>			
<b>Employer</b>			
<b>Employer Address</b>			

### Beneficiaries

<b>Name</b>			
<b>D.O.B</b>			
<b>Relationship</b>			
<b>SSN</b>			
<b>Address</b>			

Client authorizes Successful Portfolios LLC to use the information contained herein to help setup client's brokerage account.

Client Signature(s)

Date

Date