

YOUR VIEWS MATTER



INVESTMENT
SERVICES LLC
Member FINRA/SIPC

Tell Me About You

Name	Date of Birth
------	---------------

Spouse's Name	Date of Birth
---------------	---------------

 Phone Number

 Email

Financial Objectives**Interest Level**Maximize income Low Med HighReduce taxes¹ Low Med HighPass money to heirs Low Med HighGift money to charity Low Med HighProtect assets Low Med High**Areas of Interest** (choose all that apply) Investment services 401(k) rollovers Life insurance Wealth transfer Retirement planning College funding Long-term care**Yes**, please contact me regarding my financial objectives or areas of interest.

 Signature

Date

¹For a comprehensive review of your personal situation, always consult with a tax or legal advisor. Neither Cetera nor any of its representatives may give legal or tax advice.

Securities and insurance products offered through Cetera Investment Services LLC (doing insurance business in CA as CFGIS Insurance Agency), member FINRA/SIPC. Advisory services offered through Cetera Investment Advisers LLC. Neither firm is affiliated with the financial institution where investment services are offered. Advisory services may only be offered by Investment Adviser Representatives. Investments are: • Not FDIC/NCUSIF insured • May lose value • Not financial institution guaranteed • Not a deposit • Not insured by any federal government agency.

<YOUR NAME>**<YOUR TITLE>**

<YOUR EMAIL ADDRESS>

<YOUR PHONE NUMBER>

 Referred by

 Branch/Office