

FINANCIAL PROFILE	
Business Activities	
Gross Annual Income	
Net Annual Income	
Monthly Average Cash Flow Needs	
How many payments per month will you be making	
What will be the average amount per payment	
What way will you be requiring your payments to you be made: check, wire transfer, etc.	
Do you receive payments via wire transfers, cash, checks, etc. (how many average)	
What type of investments will you prefer with your money: Stocks, Bonds, Options, Futures, Bank's CDs, Real State, etc.	
What are your investment objectives: Speculation, Growth, Income, Preservation, Asset Protection, etc.	
Purposes for the account or accounts	
Origin of the funds in detail	
Investment Objectives	
Financial References	
Current CPA name	
Current Attorney Name	
Countries where business are done	

Sworn signature that all of the above is true

Initial Name

Date
