



## Information Needed to Open Your Account

Please fill out this information. Mail to the BFG office address: *1695 State Highway 169, Plymouth, MN 55441* or email to: [info@bergerfinancial.com](mailto:info@bergerfinancial.com) and have the word **"secure"** in the subject line.

If you have any questions, please call or email our office.

### Primary Investor Information

First Name

Middle Name

Last Name

Social Security Number

Date of Birth mm/dd/yyyy

Driver's License Number

Driver's License Issue Date

Driver's License Expiration Date

Email Address

Legal Address

City/State

Zip Code

Primary Phone Number

Secondary/Cell Phone Number (optional)

Marital Status (check one)  Single  Married  Domestic Partner  Widowed

Citizenship (check one)  U.S. Citizen  Resident Alien  Non-Resident Alien (W-8 Required)

### Primary Investor Employment Information

Employment Status (check one)  Employed  Self-employed  Retired  
 Homemaker  Student  Unemployed

Occupation

Employer Name

Employer Address

City/State

Zip Code

Business Phone Number

## Household Financial Information

Annual Income

Tax Bracket

Approximate Net Worth

Net Investable Assets

*(all accounts, bank, retirement, etc. excluding home)*

## Time Horizon & Liquidity Needs

Account Time Horizon

0-2 Year

2-5 Years

5-10 Year

10+ Years

Annual Expenses

Special Expenses

*(new car or home purchase, remodel, education, medical expenses, etc.)*

Special Expense Time Horizon

0-2 Year

2-5 Years

5-10 Year

10+ Years

## Risk Tolerance & Primary Investment Objective

Risk Tolerance (check one)

Conservative

Moderate-Conservative

Moderate

Moderate-Aggressive

Aggressive

Investment Objective (check one)

Current Income

High Current Income

Growth and Income

Growth

## Investment Experience

Please use the following number to signify experience in the following categories:

1=None, 2=Occasional, 3=Freqent, 4=Extensive

\_\_\_ Stocks

\_\_\_ Bonds

\_\_\_ Real Estate

\_\_\_ Insurance/Annuities

\_\_\_ Options

\_\_\_ Commodities

\_\_\_ Mutual Funds

\_\_\_ REITs/DPPs/LPs

\_\_\_ Other

## Financial Holdings

Please list the approximate dollar value of your investment assets that will be held **outside of Berger Financial Group** in the following categories:

None

\$ \_\_\_\_\_ Stocks

\$ \_\_\_\_\_ Bonds

\$ \_\_\_\_\_ Mutual Funds

\$ \_\_\_\_\_ Real Estate

\$ \_\_\_\_\_ Options

\$ \_\_\_\_\_ Insurance/Annuities

\$ \_\_\_\_\_ REITs/LPs

\$ \_\_\_\_\_ Commodities

\$ \_\_\_\_\_ Other

## Berger Financial Group, Inc.

1695 State Highway 169 | Plymouth, MN 55441

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