

THE NEXT CHAPTER QUICK STARTER GUIDE

IMPORTANT NOTE: Please complete the questionnaire below and upload, along with any documents, via the secure upload link that we provided. Reach out to your Corient team if you have not been provided a secure link. For your security, do not send the completed form or any documents via email.

Most recent financial statements including:

- ☐ Brokerage (Individual, Joint, accounts held in Trust)
- ☐ Retirement (IRA, Roth IRA, SEP IRA, 401k, 403b, pension, profit sharing etc.)
- ☐ Bank Statements
- ☐ Mortgage/Liability Statements
- ☐ Marital Settlement Agreement (MSA) or Divorce Decree
- ☐ Financial Affidavit
- ☐ Recent Tax Return
- ☐ Trust Document (if accounts titled to Trust)

CLIENT

First Name: _____ Preferred Name: _____

Middle Name: _____ Last Name: _____

Date of Birth: _____ Social Security No: _____

U.S. Citizen:

☐ Yes

☐ No

If no, what country: _____

Home Address: _____

City: _____ State: _____ Zip: _____

Cell Phone: _____ Home Phone: _____

Occupation: _____ Employer: _____

Employer Address: _____

City: _____ State: _____ Zip: _____

Work Phone: _____

Personal Email: _____ Work Email: _____

Which contact method do you prefer we use? _____

Are you a director, 10% shareholder, policy making officer for any publicly traded company?

☐ Yes

☐ No

If yes, what company: _____

Primary Beneficiary: _____

Contingent Beneficiary: _____

Dependent: _____

Date of Birth: _____ Social Security No: _____

Dependent: _____

Date of Birth: _____ Social Security No: _____

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