wealthcare SERVICES

CLIENT CARE INFORMATION

CLIENT INFORMATION:

First Name ________ Middle ________ Last Name ________ Suffix ________

SSN/Tax ID ________ Date of Birth ________ Gender: ☐ Male ☐ Female
Marital Status: ☐ Single ☐ Married ☐ Divorced ☐ Widowed

Legal Street Address (not P.O. Box) ________ City ________ State ________ Zip Code ________

**Mailing address is only necessary if different from legal address.*

Mailing Address ________ City ________ State ________ Zip Code ________

Home Phone ________ Cell Phone ________ E-mail Address ________

ID VERIFICATION:

Driver's License No. ________ Issue Date ________ Exp. Date ________ State/Country ________

EMPLOYMENT: ☐ Employed ☐ Self-Employed ☐ Retired ☐ Student ☐ Not Employed / Not Applicable

Employer Name ________ Occupation ________ Business Phone ________

Work Address ________ City ________ State ________ Zip Code ________

FINANCIAL INFORMATION:

Annual Income : ________ Approximate Net Worth: ________
Federal Tax Bracket: ________ Investable Net Worth : ________

INVESTMENT EXPERIENCE: *Use one number to signify experience for each category:* **1** *None* **2** *Occasional* **3** *Frequent* **4** *Extensive*

Stocks: ______ Bonds:______ Options: _____ Commodities:______ Real Estate: _____ Mutual Funds:_________
Insurance/Annuities_____ REITs/DPP/LP______ Other: ________

Please list specific dollar amounts for current holdings ***outside*** Wealthcare/Cambridge. ☐ None

Stocks: $________.00	Bonds: $________.00	Options: $________.00
Commodities: $________.00	Real Estate: $________.00	Mutual Funds: $________.00
Insurance/Annuities: $________.00	REIT/DPP/LP $________.00	Other: $________.00

PRIMARY INVESTMENT OBJECTIVE:

Risk Tolerance:	Conservative	Moderate-Conservative	Moderate	Moderate-Aggressive	Aggressive
	☐ Current Income	☐ Current Income	☐ Current Income	☐ High Current Income	☐ High Current Income
	☐ High Current Income	☐ High Current Income	☐ High Current Income	☐ Growth & Income	☐ Growth & Income
	☐ Growth & Income	☐ Growth & Income	☐ Growth & Income	☐ Growth	☐ Growth
	☐ Growth	☐ Growth	☐ Growth	☐ Speculation	☐ Speculation

SECONDARY INVESTMENT OBJECTIVE: (optional)

If desired, select up to **two** secondary objectives for this account or other accounts. This will allow for more options for additional investments**.**

☐ Current Income ☐ High Current Income ☐ Growth & Income
☐ Growth ☐ Speculation

TIME HORIZON/LIQUIDITY NEEDS:

Account Time Horizon: ☐ 0-2 yrs ☐ 2-5 yrs ☐ 5-10 yrs ☐ 10+ yrs
Liquidity Needs
Annual Expenses (recurring) $________.00
Est. Special Expenses (future, non-recurring) $________.00
Special Expense Timeframe: ☐ 0-2 years ☐ 2-5 years ☐ 5+ yrs