

Further Describe Source of Wealth /Detail the history of wealth for each of the sources: (e.g. For trusts, how did settlor accumulate wealth? For inheritance, how did family accumulate wealth?For business owners, how long in business, how many employees, level of profitability? Indicate type of business, countries of major activities, important business partners.)

|                               |  |                                                  |  |
|-------------------------------|--|--------------------------------------------------|--|
| Estimated Annual Income (\$): |  | Estimated amount of investable assets(\$):       |  |
| Estimated Net Worth(\$):      |  | Amount of assets planned to invest with PWM(\$): |  |

Other Known Financial Institutions:

|              |  |          |  |                        |  |
|--------------|--|----------|--|------------------------|--|
| Institution: |  | Country: |  | Est. Assets Under Mgt: |  |
| Institution: |  | Country: |  | Est. Assets Under Mgt: |  |
| Institution: |  | Country: |  | Est. Assets Under Mgt: |  |

Please indicate the family situation of the individual (marital status, other family members, etc.):