

PreviousName/MMN/Alias			
Citizenship	UNITED STATES		
Employer Name	N/A	High Risk Jurisdiction	No
Occupation	Volunteer	Industry Code (NAIC)	Individuals [999940]
Years at Occupation	2	Secondary Industry Code (NAIC)	NAIC NOT PROVIDED []

Address(es)								
Type	Notes	Address	City, State, Postal Code	Country	Tools	Entered by	Date of Update	Preferred
Legal		1000 VENETIAN WAY APT 801	MIAMI, Florida, 331391043	UNITED STATES	Map it	BATCH	06/25/2012	Yes
Legal		1000 VENETIAN WAY APT 801	MIAMI, Florida, 331391043	UNITED STATES	Map it	BATCH	06/25/2012	No
Legal		1000 VENETIAN WAY APT 801	MIAMI, Florida, 331391043	UNITED STATES	Map it	BATCH	06/25/2012	No
Legal		1000 VENETIAN WAY APT 801	MIAMI, Florida, 331391043	UNITED STATES	Map it	BATCH	06/25/2012	No

Phone(s)/Fax(s)						
Type	Notes	Phone Number	Tools	Entered by	Date of Update	Preferred
Home			Verify "Do Not Call" List	BATCH	02/15/2013	Yes
Work			Verify "Do Not Call" List	BATCH	02/07/2012	No
Cell			Verify "Do Not Call" List	TECS_DATA	06/04/2011	No
Other			Verify "Do Not Call" List	SYSTEM	07/22/2011	No
Work			Verify "Do Not Call" List	SYSTEM	09/02/2011	No
Fax			Verify "Do Not Call" List	SYSTEM	02/07/2012	No

Email(s)					
Type	Notes	Email	Entered by	Date of Update	Preferred
Home	send eotm from investor		BATCH	11/12/2011	Yes
Other			ELIZABETH HOGAN	11/15/2010	No

Cost Center & Hierarchy			
Client Status	Client	Client Type	Individual
Client Sponsor	KIRSTEN A SICHLER	New or Existing Client	Existing
Cost Center	008634 - CHBG		
Client Service Team	CHBG (DE) 4	Entity Type	Decision Maker
GIO		Portfolio Manager	
Trust Advisor		Investor	839487

Identification			
Withholding Federal Status	Domestic Certified	Withholding SSN/TIN Certification Date	03/05/2003
		SSN/TIN/EIN	
<input type="checkbox"/> Form of government issued identification obtained for the files	None		
Primary Identification Number		Issued By	
Date Issued		Expiration Date	