



CONFIDENTIAL ACCOUNT GATHERING QUESTIONNAIRE

Congratulations on becoming a new client of Stonehearth Capital Management! To streamline opening new accounts and submitting transfers, we have a few personal questions to prepare the required forms for you.

Please take a moment to answer the following:

Client #1 Information	
Legal Name:	
Primary Address:	
Date of Birth:	
SSN:	
Contact Number:	
Email Address:	
US Citizen:	
Employed:	
Employer Name and Address:	
Occupation:	
Electronic or Paper Statements and Trade Confirmations:	
Primary Beneficiary Legal Name and DOB:	
Contingent Beneficiaries Legal Name and DOB #2:	
Contingent Beneficiaries #3:	
Contingent Beneficiaries #4:	
Contingent Beneficiaries #5:	



Client #2 Information	
Legal Name:	
Primary Address:	
Date of Birth:	
SSN:	
Contact Number:	
Email Address:	
US Citizen:	
Dual Citizen:	
Employed:	
Employer Name and Address:	
Occupation:	
Electronic or Paper Statements and Trade Confirmations:	
Primary Beneficiary Legal Name and DOB:	
Contingent Beneficiaries Legal Name and DOB #2:	
Contingent Beneficiaries #3:	
Contingent Beneficiaries #4:	
Contingent Beneficiaries #5:	

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