

Employment Info

Employer Zebco Systems
Business Address 123 Client Employer Street Suite 10
City, State and Zip Code EmployerCity, CA 90210
Occupation Actuary
Joint Employer _____
Business Address _____
City, State and Zip Code _____
Occupation _____

Personal Data

Client ID # _____ Jurisdiction _____ Issue Date _____ Exp Date _____

Spouse ID # _____ Jurisdiction _____ Issue Date _____ Exp Date _____

Marital Status (Please circle one) **M** **S** **D** **W** Risk Tolerance _____

Bank Information

Bank Name _____
Bank Address _____
City, State and Zip Code _____
Bank ABA# _____ Bank Account# _____

Beneficiary Info

Primary Beneficiary

Last Name _____ First Name _____ MI _____
Relationship _____ Date of Birth _____
SSN _____ Percentage _____ %
Address _____

Secondary Beneficiary

Last Name _____ First Name _____ MI _____
Relationship _____ Date of Birth _____
SSN _____ Percentage _____ %
Address _____

Investment

	Fund Class	Amount
All American Generic Fund	<input type="checkbox"/> A <input type="checkbox"/> B <input type="checkbox"/> C	_____
World Class Generic Fund	<input type="checkbox"/> A <input type="checkbox"/> B <input type="checkbox"/> C	_____ Total _____

Notes

Financial Advisor

Name Donald c. Young Phone Number _____
Address 1 foothill blvd Ste. 10 Diamond Bar CA 91786 Rep # _____
Branch _____ Broker # _____
Broker / Dealer _____ Phone Number _____
Address _____

Client Signature X _____ Rep Signature X _____