SHEAR CAPITAL GROUP, LLC

Financial Planning and Wealth Management Services

LPL New Account Form

Essential details for opening and managing your investment account securely.

Personal Information

Name: _____ Social Security #: _____ Mobile Phone: _____
Home Phone: _____ Home Address: _____
Email Address: _____ Date of Birth: _____ # of Dependents: _____

Employment Information

Occupation: _____ Work Address: _____
Employer Name: _____

Financial Information

Enter the letter that corresponds to the correct range:

Annual Income:
Net Worth (exclusive of primary residence): _____
Liquid Net Worth: _____

Income & Net Worth Ranges:

A. $1-$24,999	E. $250,000-$499,999
B. $25,000-$49,999	F. $500,000-$999,999
C. $50,000-$99,999	G. $750,000-$999,999
D. $100,000-$249,999	H. $1,000,000-$49,999,999

Investment Experience # Yrs. _____ Years of Experience in: Annuities: _____ Mutual Funds: _____
Partnerships: _____ Margin: _____ Stocks: _____ Bonds: _____ Options: _____
Investment Time Horizon: _____ 1-3 Yrs. _____ 3-5 Yrs. _____ 5-10 Yrs. _____ More than 10 years

Asset & Investment Allocation (by percentage)

_____ Real Estate _____ Mutual Funds _____ Checking/Savings _____ Annuities _____ Insurance
_____ Equities _____ Alternative Investments _____ Bonds _____ Other (Explain) _____

Trusted Contact Person

Name: _____ Relationship: _____ Address: _____
Email: _____ Phone Number: _____

Beneficiaries (Primary)

Name: _____ | Relationship: _____ | DOB: _____ | %: _____
Name: _____ | Relationship: _____ | DOB: _____ | %: _____

Beneficiaries (Contingent)

Name: _____ | Relationship: _____ | DOB: _____ | %: _____
Name: _____ | Relationship: _____ | DOB: _____ | %: _____



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Shear Capital Group, LLC is a separate entity from LPL Financial.