Customer Information Form
GrowthPoint Investments, LLC

Name (Last, First, Middle or Company Name) _____ SSN/EIN _____

Address _____ City, State, Zip _____

Date of Birth _____ Dependents _____ Marital Status _____ Home Phone _____ Personal Email _____

Employer _____ Occupation / Title _____

Employer Address _____ Employer City, State, Zip _____

Nature of Business _____ Work Phone _____ Work Email _____

Financials

Annual Income	Liquid Net Worth	Total Net Worth	Bank Information
☐ $25-$50K	☐ $5-$25K	☐ $5-$25K	_____ Bank
☐ $50-100K	☐ $25-$50K	☐ $25-$50K	_____ City
☐ $100-200K	☐ $50-$100K	☐ $50-$100K	_____ Account #
☐ $200-$1,000K	☐ $100-$500K	☐ $100-$500K	
☐ > $1,000K	☐ $500-$1,000K	☐ $500-$1,000K	
	☐ $1,000K-$2,000K	☐ $1,000K-$2,000K	
	☐ > $2,000K	☐ > $2,000K	

Investment Experience

No/Yes and Number of Years:

Futures _____ Commodity Options _____ Commodity Funds _____ Stock/Bonds _____

Firms (open or closed – please indicate) _____

Type of Account:

☐ Individual	☐ Joint Tenancy	☐ Sole Proprietor
☐ Tenants in Common	☐ Corporate/Business	☐ Trust
☐ Estate	☐ Limited Partnership	☐ Other:

Internal Use Only

Account Name _____

_____

_____

Special Instructions _____

X_____ Customer Signature _____ Date

X_____ Customer Signature _____ Date