

Investor Information

Full Name _____

Date of Birth _____ Country of Citizenship _____

Street Address (other than PO Box) _____ City _____ State _____ Zip Code _____

Home Phone (____) _____ Office Phone (____) _____ Cell Phone (____) _____

Spouse's Full Name and DOB _____ / _____ No. of Dependents _____

Type of Account:

If you invested in a private placement, what type of account would you likely use?

Individual _____
Joint _____
IRA _____
Trust _____
Corporate _____
Simple IRA _____
401(k)/Profit Sharing _____
Roth IRA _____

In how many years would you need your investment to cash out or produce current income? _____

Years of Investment Experience: _____

Would you describe yourself as a sophisticated investor? Yes _____ No _____

Investment Objective: Income _____ Long Term Growth _____ Short Term Trading _____

Risk Tolerance/Exposure: Low _____ Moderate _____ High Risk _____ Speculative Trading _____

Annual Net Income: _____ Net Worth: _____ (excluding equity in home residence)

Source of Wealth: _____ Source of Assets: _____

Employed: Yes/No If yes, please complete: _____
Employer Name

Accredited Investor: In the United States, for an individual to be considered an accredited investor, they must have a net worth of at least one million US dollars not including the value of one's residence or have made at least \$200,000 each year for the last two years (\$300,000 with his or her spouse if married) and have the expectation to make the same amount this year."

For most Reg D, Private Placements, you must be **accredited** to be offered the opportunity to invest. TrustFirst must have financial information about investors in order to offer a private placement investment.

TrustFirst

Member of FINRA, SIPC, MSRB
865-583-7390 – 865-583-7398 (fax)
265 Brookview Centre Way, Suite 504
Knoxville, TN 37919

At TrustFirst, Inc. we realize your privacy is very important. You entrust us with personal and financial information and we take that trust very seriously. We obtain nonpublic personal information about you such as your name, address and social security number from information we receive on applications and other forms you provide to us. We will not share, distribute or sell nonpublic personal information about you or any former customer to any nonaffiliated third party except as required by law. We do disclose certain information we collect to our affiliates and companies who help us maintain and service your account. We restrict access to your personal information to those of our employees who need to know this information to provide products or services to you. We maintain physical, electronic and procedural safeguards to protect your nonpublic personal information.