Logo

Description automatically generatedAccount Registration Form

# Hi {{client.firstName}}!

# To open an account with We.Wealth, please review the form and sign at the bottom.

# CLIENT INFORMATION

|  |  |  |  |
| --- | --- | --- | --- |
| **CLIENT TITLE:** | {{client.title}} | **EMAIL:** | {{client.email}} |
| **FIRST NAME:** | {{client.firstName}} | **LAST NAME:** | {{client.lastName}} |
| **DATE OF BIRTH:** | {{client.dob}} | **ZIP CODE:** | {{client.zip}} |
| **ADDRESS:** | {{client.address}} | **ADDRESS 2:** | {{client.address2}} |
| **CITY:** | {{client.city}} | **STATE:** | {{ client.state}} |
| **OCCUPATION:** | {{client.occupation}} | **EMPLOYMENT STATUS:** | {{client.es}} |
| **PHONE:** | {{client.phone}} | **INCOME AMOUNT:** | ${{client.income}} |

**Assets and Properties**

|  |  |  |
| --- | --- | --- |
| ASSET or PROPERTY NAME | ASSET or PROPERTY DESCRIPTION | ASSET or PROPERTY VALUE |
| {{ap.item.name}} | {{ap.item.desc}} | ${{ap.item.value }} |

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By signing this form, you agree to opening an Account with We.Wealth.

|  |  |  |  |
| --- | --- | --- | --- |
| **CLIENT SIGNATURE:** | {{sign1\_es\_:signer1:signature }} | **DATE:** | {{date1\_es\_:signer1:date}} |
| **FINANCIAL ADVISOR SIGNATURE:** | {{sign2\_es\_:signer2:signature }} | **DATE:** | {{date2\_es\_:signer2:date}} |