



# CLIENT OPENING SURVEY FORM

Male  
MR./MRS./MISS

James  
FIRST NAME

Cooler  
LAST NAME

201-709-6245  
CONTACT NUMBER

201-387-9093  
ALTERNATE NUMBER

## COMPANY DATA BASE

lucy@pilot-theatre.com  
EMAIL ADDRESS

Nextgen Advisors  
COMPANY NAME

resourcetrends.com  
WEBSITE URL

3652 Viaduct Lujosa  
Address

Escondido  
City

CA  
State

92025  
ZIP Code

Business Consulting Services, NEC  
SIC DESCRIPTION

8748  
SIC CODE

Independent  
ENTITY TYPE

Under \$500,000  
COMPANY SALES

177,000  
REVENUE (USD)

San Diego  
COUNTRY/REGION

YES  
MEDICAL INSURANCE



US Hwy 1 S, Saint Augustine, FL 32086 ,Plantation Island  
Dr S, Saint Augustine, FL 32080

+1 (904) 117-  
1782