

CLIENT OPENING SURVEY FORM

| Mr/Mrs/Miss | Cristy | Lothsr |
|---|-------------------|-------------------------|
| MR./MRS./MISS | FIRST NAME | LAST NAME |
| 760-971-4622 | | 760-464-4762 |
| CONTACT NUMBER | ALTERNATE NUMBER | |
| | COMPANY DATA I | BASE |
| cristy@lother.com | Crisynda | www.dfa-oc.org |
| EMAIL ADDRESS | COMPANY NAME | WEBSITE URL |
| 25212 Spindlewood | | |
| Address | | |
| Laguna Niguel | CA | 92677 |
| City | State | ZIP Code |
| Business Services | | |
| SIC DESCRIPTION | | |
| 7389 | | Independent |
| SIC CODE | | ENTITY TYPE |
| Under \$500,000 | | 1,011,400.00 |
| COMPANY SALES | | REVENUE (USD) |
| Orange | | YES |
| COUNTRY/REGION | MEDICAL INSURANCE | |
| | | |
| Q | | <u> </u> |
| US Hwy 1 S, Saint Augustine, F Dr S, Saint Augustine, FL 32080 | | d +1 (904) 117- 1782 |