

CLIENT OPENING SURVEY FORM

| Mr/Mrs/Miss | Graciela | Ruta | |
|--|------------------|-----------------------|--|
| MR./MRS./MISS | FIRST NAME | LAST NAME | |
| 440-780-8425 | | 440-579-7763 | |
| CONTACT NUMBER | | ALTERNATE NUMBER | |
| | COMPANY DATA B | ASE | |
| gruta@cox.net | Nextgen Advisors | resourcetrends.com | |
| EMAIL ADDRESS | COMPANY NAME | WEBSITE URL | |
| 652 Viaduct Lujosa | | | |
| Address | | | |
| Escondido | CA | 92025 | |
| City | State | ZIP Code | |
| Business Consulting Services, N | NEC | | |
| IC DESCRIPTION | | | |
| 8748 | | Independent | |
| SIC CODE | | ENTITY TYPE | |
| Under \$500,000 | | 177,000 | |
| COMPANY SALES | | REVENUE (USD) | |
| San Diego | | YES | |
| COUNTRY/REGION | | MEDICAL INSURANCE | |
| | | | |
| • | | • | |
| JS Hwy 1 S, Saint Augustine, F Dr S, Saint Augustine, FL 3208 | | +1 (904) 117- 1782 | |