

## CLIENT OPENING SURVEY FORM

| $\mathbf{Mr}$  | Richard                           | Parkinson                 |
|--|-----------------------------------|---------------------------|
| MR./MRS./MISS  | FIRST NAME                        | LAST NAME                 |
| 216-313-0701   |                                   | 216-313-0701              |
| CONTACT NUMBER   |                                   | ALTERNATE NUMBER          |
|  | COMPANY DATA I                    | BASE                      |
|  | Lippenber Thompson                | 14                        |
| c.parkinson@amserve.net<br>EMAIL ADDRESS                         | Welch Soroko Gilbert COMPANY NAME | - Itws.com<br>WEBSITE URL |
| 10 Glen Ct   |                                   |                           |
| Address  |                                   |                           |
| San Francisco  | CA                                | 94104                     |
| City   | State                             | ZIP Code                  |
| Legal Services   |                                   |                           |
| SIC DESCRIPTION  |                                   |                           |
| 8111   |                                   | Independent               |
| SIC CODE   |                                   | ENTITY TYPE               |
| \$25,000,000 to \$74,999,999                                     |                                   | 103,200                   |
| COMPANY SALES  |                                   | REVENUE (USD)             |
| San Francisco  |                                   | YES                       |
| COUNTRY/REGION   |                                   | MEDICAL INSURANCE         |
|  |                                   |                           |
| •  |                                   | •                         |
| US Hwy 1 S, Saint Augustine, l<br>Dr S, Saint Augustine, FL 3208 |                                   | d +1 (904) 117-<br>1782   |