

CLIENT OPENING SURVEY FORM

| IVIS | Kate | Katon |
|--|---------------------------|-----------------------|
| MR./MRS./MISS | FIRST NAME | LAST NAME |
| 619-696-2131 | | 619-203-3094 |
| CONTACT NUMBER | | ALTERNATE NUMBER |
| | COMPANY DATA BA | ASE |
| | Concord University | _ |
| te.ratoff@scottrees.co.uk | Womens Education | www.aauw-concord.org |
| EMAIL ADDRESS | Foundation | WEBSITE URL |
| | COMPANY NAME | |
| 818 Calle Perico | | |
| Address | | |
| NA | NA | NA |
| City | State | ZIP Code |
| Real Estate | | |
| SIC DESCRIPTION | | |
| 6513 | | Independent |
| SIC CODE | | ENTITY TYPE |
| Under \$500,000 | 400,000.01 | |
| COMPANY SALES | | REVENUE (USD) |
| Contra Costa | | YES |
| COUNTRY/REGION | | MEDICAL INSURANCE |
| | | |
| • | | <u> </u> |
| US Hwy 1 S, Saint Augustine, FL 32086 ,Plantation Island Dr S, Saint Augustine, FL 32080 | | +1 (904) 117- 1782 |