



Welcome, Nick Peterson



Onboarding Request

Customers

Customer
Dashboard

Onboarding
Requests

Loan
Application

Know Your
Customer

Pending
Requests

Knowledge
Base

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Site

Supplementary documents

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documents

First Name	Sara
D.o.B	03/23/99
Last Name	(smagnuson@kdl.org)
Social Security	123-12-2345
Email Address	weskempa@gmail.com
Phone Number	6162938098
Emp. Status	I'm Employed
Employer	Liferay
Pre-tax Income	234
Invest. Goals	Education
Liquid Invest.	145
Risk Range	1234.0
Portfolio Type	Customized
Stock Action	Do nothing
Address	632 Highlander Drive Northeast
City	Rockford
State	MI
Zip	49341
Account Name	Sara (smagnuson@kdl.org)
Account Owner	Just me