SALTBOX FINANCIAL

PROFILE+

We need some additional information from you, in order to have you fully set up in our systems, and begin the accounting opening process. All your information is stored securely, in accordance with our Privacy Policy.

Personal

Person 01

Full Legal Name

Social Security Number

Person 02

Full Legal Name

Social Security Number

Trusts

01

I HAVE A TRUST

Name of Trust

Please securely share a copy of the Certificate of Trust.

I'M THE BENEFICIARY OF OR AN INTERESTED PARTY FOR A TRUST

Name of Trust

Relationship to Trust

02

I HAVE A TRUST

Name of Trust

Please securely share a copy of the Certificate of Trust.

I'M THE BENEFICIARY OF OR AN INTERESTED PARTY FOR A TRUST

Name of Trust

Relationship to Trust

Continues

Financial Emergency Contact

This is someone we can contact if we are unable to reach you or if you're experiencing a health or other type of emergency.

This does not allow us to share details about your accounts or authorize them to take any action on your behalf.

If you're in a partnered household, by default, Person 1 will be Person 2's Emergency Contact, and Person 2 will be the same for Person 1.

☐ Opt Out Here

List Emergency Contact Here:

Name	Relationship	Contact *phone, email, or both*

Shared Viewing for Investment Accounts

View-only permission applies only to your personally titled Charles Schwab & Co. brokerage accounts.

☐ **I would like someone else to be able to have access to view my Charles Schwab investment accounts online.**

Full Name	Email	Mobile Phone

If you are in a partnered household, any accounts held in your personal name by default will not be viewable to your partner.

Person 01

If you would like *Person 2* to be able to view your investment accounts via their online login, **please check here** → ☐

Person 02

If you would like *Person 1* to be able to view your investment accounts via their online login, **please check here** → ☐

Continues

Beneficiaries

We will review and discuss the application of beneficiaries to your specific accounts. Beneficiaries do not apply to all accounts, and beneficiaries can be updated at any time.

Person 01

PRIMARY

FULL NAME / ENTITY NAME	PORTION %	DATE OF BIRTH	RELATIONSHIP

CONTINGENT

FULL NAME	PORTION %	DATE OF BIRTH	RELATIONSHIP	AFTER THEM, TO THEIR HEIRS
				☐
				☐
				☐

☐ NOT SURE YET / NEED TO DISCUSS

Person 02 *Next Page* →

Beneficiaries

Person 02

PRIMARY

FULL NAME / ENTITY NAME	PORTION %	DATE OF BIRTH	RELATIONSHIP

CONTINGENT

FULL NAME	PORTION %	DATE OF BIRTH	RELATIONSHIP	AFTER THEM, TO THEIR HEIRS
				☐
				☐
				☐

☐ NOT SURE YET / NEED TO DISCUSS

Continues

Account Setup

Linking a Bank Account

At least 1 required, can link 2 or more.

NAME OF BANK	NAME(S) ON THE ACCOUNT	ACCOUNT TYPE
		☐ CHECKING ☐ SAVINGS
		☐ CHECKING ☐ SAVINGS
		☐ CHECKING ☐ SAVINGS

Other Info

Additional comments, context, or history that you wish to share: