



BEING INDEPENDENT SHOULDN'T MEAN BEING ALONE

# Advisor Application

ADVISOR INFORMATION			
Name as shown on CRD:	Nickname:	Name of Current Firm:	
Date of Birth:	SSN:	Referred By:	
Home Address:	City:	State:	Zipcode:
Preferred Email:			Preferred Phone Number:
Spouse Name: (if applicable)		Children: (if applicable)	

LICENSES AND DESIGNATIONS	
Do you need to add or remove any licenses currently listed on FINRA?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Are you insurance licensed?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Designations:	<input type="checkbox"/> CFP <input type="checkbox"/> ChFC <input type="checkbox"/> AIF <input type="checkbox"/> CPA <input type="checkbox"/> CIMA <input type="checkbox"/> CLU <input type="checkbox"/> LUTCF <input type="checkbox"/> MBA <input type="checkbox"/> JD <input type="checkbox"/> CRPC <input type="checkbox"/> AAMS <input type="checkbox"/> CRPS <input type="checkbox"/> None <input type="checkbox"/> Other: _____

BUSINESS INFORMATION		
AUM:	Trailing 12 GDC:	% Advisory:
Will you: <input type="checkbox"/> Continue to use your current DBA	<input type="checkbox"/> Create a new DBA	<input type="checkbox"/> Use Blackbridge Financial as your DBA?
Will you: <input type="checkbox"/> Already have office space	<input type="checkbox"/> Will secure new office space on own	<input type="checkbox"/> Would like assistance securing office space?
Do you: <input type="checkbox"/> Use Redtail Technology CRM	<input type="checkbox"/> Use Dropbox	<input type="checkbox"/> Have a FedEx account established?

STAFFING			
Staff Member:	Title:	<input type="checkbox"/> Licensed	<input type="checkbox"/> Non-Licensed
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Are you currently looking for additional staff?		<input type="checkbox"/> Yes	<input type="checkbox"/> No
Will you be requesting assistance with repapering?		<input type="checkbox"/> Yes	<input type="checkbox"/> No

TECHNOLOGY	
Will you need website or marketing development assistance?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Do you have the ability to scan and upload documents?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Do you currently use social media?	<input type="checkbox"/> Yes <input type="checkbox"/> No
	If yes: <input type="checkbox"/> Linked In <input type="checkbox"/> Facebook <input type="checkbox"/> Twitter <input type="checkbox"/> Other