



Oakleaf Financial Services

A Subsidiary of Sturgis
Bank & Trust Company

113-125 East Chicago Road • Sturgis, Michigan 49091
269-651-2475 • 1-800-362-6827 • Fax 269-651-7273
Email: Oakleaf@lpl.com • www.lpl.com/oakleaf.financial

Information Required to Establish an Account

Please complete and fax back us at 269-651-7273

Name: _____

Address: _____

Social Security #: _____

Date of Birth: _____

Phone:

Daytime: _____

Evening: _____

Drivers License Info:

License #: _____

Expiration Date: _____

State: _____

Employment Info

Current Employer: _____

Years of Employment: _____

Job description: _____

Advisory Services, Securities and Insurance Products offered through: Linsco/Private Ledger, member NASD/SIPC

Not FDIC Insured	Not a Deposit	No Bank Guarantee	May Lose Value	Not Insured by any Federal Government Agency
------------------	---------------	-------------------	----------------	----------------------------------------------

Sturgis Bank & Trust Company is not a broker/dealer nor affiliated with Linsco Private Ledger