## "Ask First!"

Print Name: Thomas Trevor Murch

This form is to be filled out by any person who is offering legal, financial, retirement, insurance, accounting, estate, long-term care or similar planning services.

Respond to ALL categories completely; sign and date at the bottom of the page.

MY EDUCATION- I have achieved.	ed the following level of educa	ation (chec	k HIGHEST le	evel achieved):
□ Some High School □ High School Diploma			☐ Bachelors Degree	
☐ GED ☐ Some College			Masters or other Advanced Degree	
<b>MY CREDENTIAL(S)- I</b> have the CLU, CPA, JD, MBA, years of relevant	/ant experience):			nples: CFP, ChFC,
CLPF - California Li	censed Professional	Fidu	nciary	
MY RELEVANT LICENSE(S)- I     services I am offering to you (e)	have the following license(s) examples: bar license (attorne	giving me t y); securit	the legal autho ies license; ins	ority to provide the surance license):
License Type	Covers What Activities		Issued By License No.	
CLPF Serving	in Fiduciary Positions	Fiduci	any Berrequ	822
			,	
<ul> <li>◆ LEGAL SERVICES- (Check ON</li> <li>✓ I DO NOT practice law, and the s</li> <li>☐ I DO practice law, and have an a</li> <li>☐ I DO practice law, but DO NOT h supervision of the following attention</li> </ul>	ervices I am offering to you d ctive license to practice law ir ave an active license to pract	California	ı. California. I am	n, however, under the
Name of attorney:		Telephone:		
Name of automey.		Teleph	none:	
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Telephone: 4