

## **Customer Identification Program**

In accordance with federal law, Bishop, Rosen & Co., Inc. must make a reasonable determination and verification of our clients' profile information. The profile information was obtained from you by your Financial Advisor and recorded onto our new account form document. At the time of the opening of your account, National Financial Services, LLC., cross checks your name, address and social security number against Equifax's database for personal accounts and Dun & Bradstreet for non-personal accounts to verify its' accuracy. In addition, our firm may obtain a credit report on you. Any information obtained will be kept in the strictest confidence and in accordance with our privacy policy contained herein.

(Reviewed 12/2009)