



8401 Royal Oak Dr. Savannah, Ga. 31406

jay@xceltoday.com

912-401-3094

Advisor Information

Personal Information

Date _____

Name _____ (First, Middle, Last)

Current Address _____

Phone _____ Email _____

List Spouse and Children _____

Age _____ Date of Birth _____

Have you ever been convicted of any crime other than minor traffic violation? _____

If yes, please explain _____

Employment & Training

1. List Current Employer _____ How long _____
2. List Specialized Training _____
3. Do you enjoy public speaking - yes / no
4. If yes, please list speaking opportunities you've had in the past year.

The Xcel office will contact you for personal information (i.e. - Social Security Number) to complete background check. We will not keep your Social Security Number on file.