



CIP Notice to Clients

Important Information About Procedures for Opening a New Account

To help the government fight the funding of terrorism and money laundering activities, federal law requires all financial institutions to obtain, verify, and record information that identifies each person who receives services from Bulldog Financial Planning.

What this means for you: Whenever you start a customer relationship with me, I will ask for your name, address, date of birth and other information that will allow me to identify you. I may also ask to see your driver's license or other identifying documents.