



CAPITAL MANAGEMENT

500 Strawberry Plains Rd, Suite 100
Williamsburg, VA 23188
Phone: 757.565.7700
Fax: 757.565.7784

Our only client is you.

Our Resources at Your Service...

As our client, we want the service you receive from your team at Gore Capital Management to be of the highest caliber. Simply refer to this form anytime you need our assistance. We want you to receive the help you need as quickly and effectively as possible.

Your financial advisors: Peter H. Gore

Phone: 757.565.7700 ext. 1

Email: pgore@gorecap.com

Ben Sadtler

757.565.7700 ext. 2

bsadtler@gorecap.com

As your financial advisors, we can guide you through:

- Financial and investment planning
- Asset allocation and portfolio review of investments held within and outside Raymond James & Pershing
- Specific goal planning (retirement, college, wealth building, etc.)
- Information, advice and trading on stocks, bonds, mutual funds and unit investment trusts
- Fixed and variable annuities
- Fee-based and managed money services through Raymond James & Associates' Asset Management Services division and other clearing firms
- Life, long-term care and disability insurance analysis/review
- Supporting your family, friends and colleagues with this same level of service

Your service associate: Keri S. Gore

Phone: 757.565.7700 ext. 3

Email: kgore@gorecap.com

Please contact for:

- Scheduling appointments
- Account balances, positions and values
- Deposits, withdrawals, wire and ACH transfers from your account
- Questions about your statement or other paperwork
- Updating your information (name or address change, etc.)
- Tax documents (1099 forms, year-end statements, etc.)
- Check reorder, check copies, lost checks or VISA card
- Setting up Internet access (Investor Access, Raymond James & NetxInvestor, Pershing) to your account

Online Access – gorecap.com, raymondjames.com, netxinvestor.com

Use to:

- View your Raymond James and/or Pershing statement and account activity
- View prior statements
- Get quotes, news, research and economic outlook and more