

Investment Codes		Insurance Codes	
A Stocks	E Options	I Life	L Property & Casualty
B Bonds	F Real Estate	J Health	M All Coverage's
C Mutual Funds	G General	K Disability	
D Commodities	H Other		

Name	Firm	Address	Telephone	Relationship Codes
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**Relationship Codes**

- 1 Friend
- 2 Relative
- 3 Legal advisor
- 4 Tax advisor
- 5 Accounting advisor
- 6 Banking advisor
- 7 Investment advisor
- 8 Insurance advisor
- 9 Financial advisor
- 10 Other