



**PRIVATE
CLIENT
SERVICES™**
MEMBER FINRA, SIPC
A Registered Investment Advisor

Monthly Outside Business Activity Log

(LTC, DI, Life, P&C, Health, etc...)

Reviewed By:

Representative:	
Month / Year:	

Date:	Managing Principal Signature:

	Application Date	OBA Type	Face Amount (If applicable)	Product Provider	Owner / Insured	Source of Premium	Comments / Other Information
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