

Discretionary Investment Management Account

Account No.

Personal Information

Title

First Name

Last Name

Other Names

Date of birth

Gender Male Female

Marital Status Single Married

ID Type Driver's License Passport
 Voter's ID NHIS
 Other

ID Number

Occupation

Source of income

Other sources of funds

Purpose of investing

Next of kin

Relationship

Personal Information (Joint Account Holder)

Title

First Name

Last Name

Other Names

Telephone

Email

ID Type Driver's License Passport
 Voter's ID NHIS
 Other

ID Number

Note

* All telephone requests for withdrawals should be backed by an authorization ID from the client
 *Kindly use another form if there are additional joint account holders.

AFFIX PASSPORT PICTURE HERE

AFFIX PASSPORT PICTURE HERE

Contact Information

Telephone

Email

Postal Address

Permanent / Residential Address

Investment Options

Roll over with interest Redeem on Maturity
 Pay investment returns only on maturity

Initial Investment

Amount

Date

Receipt Number

Investment Horizon

91 days (3 months) 182 days (6 months) 364 days (1 year) 2 Years

Applicants Signatures

Name

Signature

Name

Signature

Account mandate

For Official use only

Officer's name

Signature

Date

Agreed Rate