

Customer Account Number

Title Mr. Mrs. Ms. Dr. Other:

Full Name

Customer Identification

Enclosed Identification Copies (any 1 of the following)

- National ID Card
- Driver's License
- Passport

Kindly enter the identification numbers for the ID's you have supplied

National ID #

Driver's License #

Passport #

Investment Information

Risk Tolerance

- Conservative; preserving principal and minimizing risk are most important
- Moderate; seeking the highest possible return consistent with a moderate level of risk
- Aggressive; seeking a high total return regardless of the risk involved

Investment Objectives

- Capital Appreciation
- Income

Investment Horizon

- Short term; 1-2 years
- Medium term; 3-5 years
- Long term; Over 5 years

Investment Experience Level

- Beginner
- Intermediate
- Savvy; no. of years experience

Income Bracket

- Less than \$18,000
- \$18,001-\$48,000
- \$48,001-\$120,000
- \$120,001-\$240,000
- Over \$240,000