



ACCOUNT OPENING FORM –JOINT

1. Personal ACCOUNT HOLDER #1

Name

(Title) (Surname) (First Name) (Middle Name)

Sex M F Date of Birth DD MM YY Place of Birth

Country of Birth Mother's Maiden Name

Residential Address

City State Country

Mailing Address

City State Country

E-mail Phone

Nationality Do you have Dual Citizenship? Yes No Please state the second Country here

Identity Type Driver's License National Identity Card Int. Passport Others Please specify

ID Number Expiry Date DD MM YY

2. Career/Employment

Occupation Employer

Employer's Address Phone No.

Employment Status Salaried Employment Self Employed Retired Unemployed Student

Expected Annual Turnover Less Than ₦5M ₦5M - ₦20M ₦20M - ₦100M ₦100M & Above

Source of Fund Salary Business Income Investment Personal Savings Others

3. Next of Kin Information

Name

Sex M F Date of Birth DD MM YY Relationship

Nationality

Contact Address

Phone Email

4. Bank Account Information

Bank Account Name

Bank Account Number Bank Name

Bank Verification No.

5. Personal

ACCOUNT HOLDER #2

Name	<input type="text"/>									
	(Title)	(Surname)			(First Name)			(Middle Name)		
Sex	<input type="checkbox"/> M	<input type="checkbox"/> F	Date of Birth	<input type="text"/> DD	<input type="text"/> MM	<input type="text"/> YY	Place of Birth	<input type="text"/>		
Country of Birth	<input type="text"/>			Mother's Maiden Name	<input type="text"/>					
Residential Address	<input type="text"/>									
City	<input type="text"/>			State	<input type="text"/>			Country	<input type="text"/>	
Mailing Address	<input type="text"/>									
City	<input type="text"/>			State	<input type="text"/>			Country	<input type="text"/>	
E-mail	<input type="text"/>						Phone	<input type="text"/>		
Nationality	<input type="text"/>			Do you have Dual Citizenship?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	Please state the second Country here			
Identity Type	Driver's License	<input type="checkbox"/>	National Identity Card	<input type="checkbox"/>	Int. Passport	<input type="checkbox"/>	Others	<input type="checkbox"/>	→ Please specify	
ID Number	<input type="text"/>						Expiry Date	<input type="text"/> DD	<input type="text"/> MM	<input type="text"/> YY

6. Career/Employment

Occupation	<input type="text"/>			Employer	<input type="text"/>					
Employer's Address	<input type="text"/>						Phone No.	<input type="text"/>		
Employment Status	Salaried Employment	<input type="checkbox"/>	Self Employed	<input type="checkbox"/>	Retired	<input type="checkbox"/>	Unemployed	<input type="checkbox"/>	Student	<input type="checkbox"/>
Expected Annual Turnover	Less Than ₦5M	<input type="checkbox"/>	₦5M - ₦20M	<input type="checkbox"/>	₦20M - ₦100M	<input type="checkbox"/>	₦100M & Above	<input type="checkbox"/>		
Source of Fund	Salary	<input type="checkbox"/>	Business Income	<input type="checkbox"/>	Investment	<input type="checkbox"/>	Personal Savings	<input type="checkbox"/>	Others _____	

7. Next of Kin Information

Name	<input type="text"/>									
Sex	<input type="checkbox"/> M	<input type="checkbox"/> F	Date of Birth	<input type="text"/> DD	<input type="text"/> MM	<input type="text"/> YY	Relationship	<input type="text"/>		
Nationality	<input type="text"/>									
Contact Address	<input type="text"/>									
Phone	<input type="text"/>			Email	<input type="text"/>					

8. Bank Account Information

Bank Account Name	<input type="text"/>									
Bank Account Number	<input type="text"/>				Bank Name	<input type="text"/>				
Bank Verification No.	<input type="text"/>									

9. Joint Account Details

Joint Account Name

Account Holder #1

PASSPORT
PHOTOGRAPH

SIGNATURE

DATE

Account Holder #2

PASSPORT
PHOTOGRAPH

SIGNATURE

DATE

Account Type

Stockbroking

Fixed Income

Foreign Currency Investments

Separately Managed Account

Investment Plans

Others

Mandate

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Account Opening Requirement Checklist

Account Holder #1
Provided

Account Holder #2
Provided

1. Completed Account Opening Form
2. Completed Share Transfer Form
3. 1 Passport Photograph
4. Copy of Means of Identification
5. Proof of Address (Utility Bill)
6. Indemnity Form/Power of Attorney
7. Signed Stockbroking Agreement
8. Mandatory Minimum Initial Deposit

Risk Assessment Profile

Low Risk

Medium Risk

High Risk

Investment Advisor

Signature

Date

Authorizing Officer

Signature

Date