



Your Structure, Your Wealth

# INVESTMENT ACCOUNT OPENING FORM PERSONAL/INDIVIDUAL

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## ITF INSTUCTIONS

Surname	Fist Name	Date of birth (DD/MM/YY)					
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## INVESTMENT OBJECTIVE & RISK ASSESSMENT

How long do you plan to invest?    < 1 year     1-2 years     3-5 years     More than 5 years

How much of a risk taker are you with Investing?    Low     Medium     High

What is the source of fund for the investment?    Salary     Savings     Inheritance

Other, please specify

What is your estimated Monthly Net Income (GHS '000)?

Below 5,000     5,000-, 9,999     10,000-19,999     Above 20,000

Other Sources of Income

What is your overall knowledge about investment?

Limited     Moderate     Extensive     Don't Know

What are you investing primarily for?    Income     Education     Retirement     Mortgage

Travel     Other, please specify

What other investments do you currently have?

Equity     Bond     Real Estate     Other, please specify

Is the applicant a Politically Exposed Person (PEP) or associated with PEP?    YES     NO

If Yes, Please state the relationship:

KYC/Risk Profile:    Low Risk     Medium Risk     High Risk

## INVESTMENT AT 10TH CAPITAL

Amount in figures

Amount in words

Duration

Roll Over on Maturity:    Yes     No     Principal only     Interest only     Principal & interest

Transaction Alert:    SMS Alert     Email Alert

Statement Preference:    Post     Email     Collect by person

How did you find out about us?    Family     Friends     Publication

If Other, specify

## BENEFICIARY DETAILS

NAME(S)	RELATIONSHIP	DATE OF BIRTH	CONTACT NO.	ADDRESS	%

