

REQUEST FOR INVESTMENT ACCOUNT

PERSONAL DATA AND INVESTMENT REQUIREMENTS

Desired lump sum investment		Total duration of investment	
Full name			
Passport number	Passport expiry date	Date of birth	Gender
Email address		Mobile phone	
Residential address			

WORK INFORMATION

Employer name			
Employer address			
Job title		Industry	Tax identification number
Employment start date	Yearly salary	Other unearned income	Are you a US citizen or taxpayer?
			☐ Yes ☐ No
Company address			

DESIRED FUNDING METHOD

Credit/debit card	☐			
Credit card number		Expiry date		
Credit card type	☐	Visa	☐	Mastercard
			☐	American Express
Bank account	☐			
Bank account number				
Bank name				
Bank address				

Signature or initials	Print name	Date
		

- You understand that you have already discussed with your advisor the most suitable platform for your needs.
- This information is not to be completed by United States or Hong Kong residents.
- We make no representation that the products and services available comply with the laws of your jurisdiction. If you open up an account you do so with your own responsibility and are responsible for ensuring compliance with all local laws.