



REQUEST FOR INVESTMENT ACCOUNT

PERSONAL DATA AND INVESTMENT REQUIREMENTS

Desired monthly 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			

FUNDING METHOD

Credit/Debit Card Number	
Credit Card Type	
Expiry Date	

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.