

INVESTMENT REGISTRATION FORM (IN-TRUST APPLICANTS)

Passport Size
 Photo

IRF#

1.0 PERSONAL DETAILS

Surname:
 First Name(s):
 ID No.:
 Gender: Male Female
 Date of Birth:
 Mailing Address:
 Telephone:
 Email (if any):

APPLYING ON BEHALF OF:

Surname:
 First Name(s):
 Is he/she a Minor (below 18 years):
 Yes No
 Relationship with Applicant:

2.0 BENEFICIARY

Surname:
 First Name:
 Gender: Male Female
 Date of Birth:
 Mailing Address:
 Telephone:

3.0 INITIAL DEPOSIT (GH¢)

Amount in Words:
 Amount in Figures:
 Form of Payment (Cash/Cheque)
 Signature:
 Date:

4.0 FREQUENCY OF CONTRIBUTION:

Monthly Quarterly Yearly Half-Yearly Randomly

5.0 INVESTMENT HORIZON:

3 – Months 6 – Months 1 – Year > 1 – Year

6.0 TICK INVESTMENT TYPE:

Fixed Income Instrument Shares/Stocks Mutual Fund Other(s)

If you tick Other(s) Specify.....

7.0 INVESTMENT KNOWLEDGE:

Minimum Medium Advanced

8.0 FOR OFFICE USE ONLY:

Name: Signature:
 Designation: Date: