

APPLICATION FORM

Date: ___/___/___

Applicants Name : _____ Surname: _____

| | |
|---|--|
| Email Address | |
| Postal Address | |
| Code | |
| Home Tel | |
| Work Tel | |
| Cell Number | |
| Occupation | |
| Your Current Income | |
| < 100,000/per year...../ < 500,000/per year...../ > 500,000/per year..... | |

Investment Objectives

A. What is your **primary** investment objective (You can select more than one objective?)

Wealth Preservation Income Generation Capital accumulation

B. Does a certain amount of income need to be generated from this investment account?

If Yes Explain

C. How extensive is your experience of financial markets, particularly with regards to direct investments in shares, listed securities, bonds, derivatives?

None Moderate Fair High

D. **Investment Profile**

If you had R1 million invested for 5 years, what payout would you expect?

1. Maximum R1,5 million, minimum R1 million
2. Maximum R2 million, minimum R750 000
3. Maximum R3 million, minimum R500 000
4. Maximum R5 million, minimum R0

How do you expect your investment income to perform?

- 1. Worse than inflation
- 2. In line with inflation
- 3. Better than inflation

How would you describe your investment horizon?

Short-term Medium-term Long-term

When do you expect to start withdrawing your investments?

Less than 3 years 3 to 5 years More than 5 years

How many people depend on you, the Applicant, financially?

More than two Two One

How do you derive your income?

- 1. Retired
- 2. Only from investments
- 3. Self Employed
- 4. Salaried

How many years do you have left till retirement?

- 1. Less than 5
- 2. Between 5-10years
- 3. Between 10-15 years
- 4. More than 15 years

From the above, would you say you are a:

Conservative Investor Balanced Investor Aggressive Investor

Unique Circumstances

Are there any special unique circumstances apparent, such as maintaining current lifestyle, or achieving the interest of any beneficiaries?

Applicants Name

Signature

____/____/____
Date