



RC 224,109

(Members of The Nigerian Stock Exchange)

Registered by Securities & Exchange Commission

Dynamic House, Pent House & 2nd Floor, 20, Campbell Street, Lagos P. O. Box 75649 Victoria Island, Lagos Nigeria. Email: dynamicportfolio@yahoo.com Tel: 234-1-2702508, Fax:2702509



# INDIVIDUAL CLIENT ACCOUNT INFORMATION.

## 1.0 CLIENT PROFILE

Title  Surname  Other Names

If Joint  Title

1.1 TYPE OF PRODUCT/SERVICES: Stockbroking  Nominee   
 Asset Management

## 1.2 CONTACT INFORMATION

### Contact Address

### Alternative Contact Address

### PHONE NUMBER

Office:  Home:

Mobile:  Fax:

E-Mail:

## 1.3 OTHER INFORMATION

Gender:  Religion:  Profession:

State of Origin:  Date of Birth:

## 2.0 INVESTMENT DETAILS

Initial Investments:  Mode Of Payment :

Type Of Investment Required  Income Stock  \*Growth Stock  Income And Growth

## 3.0 STATEMENT OF ACCOUNT

### HOW DO YOU WANT TO RECEIVE YOUR QUARTERLY CSCS STATEMENT OF STOCK POSITION?

Post  Courier  Physical Collection

### HOW DO YOU WANT TO RECEIVE YOUR CONTRACT NOTES?

Post  Courier  Physical Collection  E-Mail

## 3.1 NEXT OF KIN

Full Name: \_\_\_\_\_

Address: \_\_\_\_\_

Relationship: \_\_\_\_\_

Account Holder Signature: \_\_\_\_\_

Mother's Maiden Names: \_\_\_\_\_

\*Strike out as appropriate

\*Speculative stocks have higher levels of risk and return

**ATTESTATION:**

I confirm having read and understood the system of operating my account as prescribed above and Dynamic Portfolio Limited will not be held responsible for misjudgement.

Signature.....

Date:...../...../.....

**4.0 OTHER PRODUCTS / SERVICES.....**

**FOR OFFICE USE ONLY**

**5.0 DOCUMENTATION AND FUNDS RECEIVED**

Cheque	<input type="text"/>	Cash	<input type="text"/>	Amount	<input type="text"/>	Cheque Details	<input type="text"/>		
Share Exchange Form	<input type="text"/>	Valued At	<input type="text"/>	As At	<input type="text"/>				
Direct Debit Mandate	<input type="text"/>	Amount	<input type="text"/>	Every	<input type="text"/>	For	<input type="text"/>	Years	<input type="text"/>
Guarantor	<input type="text"/>								
Investment Profile	<input type="text"/>	Portfolio Allocation Mandate	<input type="text"/>						
Passport Pictures	<input type="text"/>	Investment Management Agreement	<input type="text"/>						
Signature Mandate	<input type="text"/>	Identification	<input type="text"/>						

**6.0 RECEIVED BY:**

Name:.....

Signature:.....

Date:.....

Comments / Waivers.....

**ACCOUNT MANAGEMENT INFORMATION**

Account Opened By:.....

Account Numbers:.....

Account Manager:.....

Contact Person / Reference:.....

Account Approved By:.....