

# ACCOUNT INFORMATION FORM



20 Dominica Drive, Kingston 5  
 email: fhc.investments@fhccu.com  
 Tel: 876-906-5317 / 876-908-1502 / 876-929-5142  
**CARING FOR YOU AND YOUR INVESTMENTS**

Account Type: <input type="checkbox"/> Individual <input type="checkbox"/> Corporate		Account No:	Client No:
Primary Holder/ Company Name:			Alias:
1st Joint Holder/ Signatory:			Alias:
2nd Joint Holder/ Signatory:			Alias:
3rd Joint Holder/ Signatory:			Alias:
Account Authority:	<input type="checkbox"/> Full Discretion <input type="checkbox"/> Partial Discretion <input type="checkbox"/> Custody		Risk Appetite: <input type="checkbox"/> Conservative <input type="checkbox"/> Moderate <input type="checkbox"/> Aggressive
Investment Objectives	<input type="checkbox"/> Capital Appreciation <input type="checkbox"/> Liquidity <input type="checkbox"/> Income Generation <input type="checkbox"/> Capital Preservation <input type="checkbox"/> Other: _____		
Expected Transactions:	Deposits	Amount:	Frequency:
	Withdrawals	Amount:	Frequency:
<b>INVESTMENT INFORMATION</b>		<b>PORTFOLIO ALLOCATION</b>	
Initial Investment (\$):			<input type="checkbox"/> USD <input type="checkbox"/> JMD    %    Fixed Income
Bank:			<input type="checkbox"/> USD <input type="checkbox"/> JMD    %    Equity
Account Number:			<input type="checkbox"/> USD <input type="checkbox"/> JMD    %    Portfolio Management
Source of Funds:			<input type="checkbox"/> USD <input type="checkbox"/> JMD    %    Unit Trust
Special Instructions			
Statements	<input type="checkbox"/> Mail <input type="checkbox"/> Email:		
The contact information will be used to provide updates on your portfolio and any relevant market information.			

I/We the undersigned, being the person(s) specified above (hereinafter, together jointly and severally if more than one, referred to as "the client") hereby request FHC Investments Limited of 20 Dominica Drive, Kingston 5, Jamaica, a company duly incorporated under the laws of Jamaica (herein referred to as "the Company") to open one or more accounts in my/our name(s) with respect to instruments issued to me/us by and/or securities and other investments held by me/us through the Company, and all accruals, payments, receipts and transactions relating thereto.

I/We acknowledge and agree that the Company's General Terms and Conditions attached hereto, as varied by the Company from time to time, are accepted by and are binding on me/us, and shall govern the said account(s) and all instruments issued to me/us by and/or securities and other investments held by me/us through the Company, and all accruals, payments, receipts and transactions relating thereto. I/We hereby agree to abide by and comply with the provisions set forth in the said General Terms and Conditions attached hereto, as varied by the Company from time to time. I/We hereby acknowledge having received a copy of this Client Account Agreement and the said General Terms and Conditions.

Signatory Name	Signature	Witness' Name	Witness' Signature	Date

For Internal Use	Name	Signature	Date
Input Officer			
Approval Officer			