



'BUILDING SOLID LEGACIES'

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INDIVIDUAL ACCOUNT INFORMATION FORM

ACCOUNT #			
PRIMARY HOLDER		Alias	Client #
1 st JOINT HOLDER/SIGNATORY		Alias	Client #
2 nd JOINT HOLDER/SIGNATORY		Alias	Client #
3 rd JOINT HOLDER/SIGNATORY		Alias	Client #
SIGNING MANDATE	<input type="checkbox"/> Primary Holder Only <input type="checkbox"/> All Holders <input type="checkbox"/> Any Holder <input type="checkbox"/> Any 2 Holders <input type="checkbox"/> Other: _____		
ACCOUNT AUTHORITY	<input type="checkbox"/> Full Discretion <input type="checkbox"/> Partial Discretion <input type="checkbox"/> Custody <input type="checkbox"/> 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:
INVESTMENT INFORMATION			
INITIAL INVESTMENTS			
BANK			
ACCOUNT #			
SOURCE OF FUNDS			
PORTFOLIO ALLOCATION			
<input type="checkbox"/> USD <input type="checkbox"/> JMD	%	FIXED INCOME	
<input type="checkbox"/> USD <input type="checkbox"/> JMD	%	EQUITY	
<input type="checkbox"/> USD <input type="checkbox"/> JMD	%	PORTFOLIO STATEMENT	
<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.

Client Name	Signature	Witness' Name	Witness Signature	Date

For Internal Use	Name	Signature	Date
Input Officer			
Approval Officer			

I understand that FHC Investments Limited (FHCIL) collects and processes the personal data herein to provide financial services, manage risks and comply with legal and regulatory obligations; to communicate with me and provide customer service, and to share information about our products, services and promotional activities.

I further understand that my personal data may be shared within our corporate structure which includes First Heritage Co-operative Credit Union, its subsidiaries, associated and affiliated companies, as well as regulators and other third parties as defined in FHCIL's Privacy Notice.

Details on how FHCIL processes personal information, who it is shared with, and data subject rights can be accessed at bit.ly/41oPkiz or by scanning the QR code. Get in touch with any concerns or queries at DPA@fhccu.com.



FHCIL Privacy Notice