

Majestic State Holdings Limited Investments Consultant

Majestic State Holdings Limited Investments Account No.

Select an Account ☐ Individual ☐ Joint ☐ Trust ☐ Corporate



Client Individual Details

(Joint account holders please download and complete a separate Account form)

Title	First Name	Middle Name	Surname

Name of Secondary Account Holder (if applicable)

Title	First Name	Middle Name	Surname

Residential Address

Residential Phone No.	Personal Mobile No.
Residential Fax No.	Personal Email Address

Client Business Details

Occupation/Title	Company Fax No.
Company Name	Ext No.
Company Address	Company Mobile No
Company Phone No.	Company Email Address

Please check your preferred Mailing address for Statement, Mail & Confirmation

- ☐ Residential
- ☐ Office
- ☐ Other

Please check your choice of phone communication

- ☐ Residential
- ☐ Office
- ☐ Other

Investor Profile

Do you have an account with a financial management company or local brokerage? ☐ Yes ☐ No

Do you have an online account? ☐ Yes ☐ No

Do you track your investments online? ☐ Yes ☐ No

Your financial requirements are? ☐ Growth ☐ Income

Type of Investor ☐ Conservative ☐ Moderate ☐ Aggressive

Your investment time frame ☐ up to 1 YEAR ☐ 1-3 years ☐ 3-5 years ☐ 5 years and above

Rate your investment experience ☐ None ☐ Limited ☐ Good ☐ Extensive

Which of the following investments do you currently have?

- | | |
|---|---|
| <input type="checkbox"/> Stocks | <input type="checkbox"/> High Interest Savings |
| <input type="checkbox"/> Hedge Funds | <input type="checkbox"/> Managed Funds |
| <input type="checkbox"/> Private Equity Funds | <input type="checkbox"/> Other Cash Deposits |
| <input type="checkbox"/> Bonds | <input type="checkbox"/> Tax Free Savings Accounts |
| <input type="checkbox"/> Cash ISA | <input type="checkbox"/> PEPs (Managed by a Fund Manager) |

Your Net Income

- | | |
|---|---|
| <input type="radio"/> 0 - 100,000 | <input type="radio"/> 1 Million and above |
| <input type="radio"/> 100,000 - 500,000 | <input type="radio"/> 5 Million and above |
| <input type="radio"/> 500,000 - 1 Million | |

Net Worth

- | | |
|---|---|
| <input type="radio"/> 0 - 100,000 | <input type="radio"/> 1 Million and above |
| <input type="radio"/> 100,000 - 500,000 | <input type="radio"/> 5 Million and above |
| <input type="radio"/> 500,000 - 1 Million | |

Do you travel regularly overseas?

- ☐ Yes
☐ No

Most frequent destinations?

Are you a Director or Chief Executive Officer of a Publicly Traded Company?

- ☐ Yes
☐ No

Name of Company (if Applicable)

This is considered a legal document press agree and then submit.

- ☐ Agree
☐ Disagree

Banking Instruction

Please be advised in the interests of security a separate Banking letter will be sent to you upon receipt of this Account Form.

Account Declaration

I confirm that the information provided in this document is accurate and complete

I confirm that I will inform in writing or notify Majestic State Holdings Limited Investments of any change of address or contact details.

Signature
Full Printed Name

Date