

Client Information Form (Individual)

Client Information

Name of Applicant:

NRIC No. /Passport No.

Investment Profiling

1a) What are your financial objectives?

2) What is your risk tolerance?

3) What is your employment status?

4) What is your financial situation (including assets, liabilities, cash flow and income)?

5) What is your source and amount of regular income?

6) What are your current financial commitments?

7) What is your current investment portfolio?

8) Is the amount to be invested a substantial portion of your assets?

Declaration

I declare to the best of my/ our knowledge and belief that the information given above is true in every respect.

Signature of Main Applicant

Name: _____

Date: _____ (DD/MM/YY)

Signature of Joint Applicant
(If applicable)

Name: _____

Date: _____ (DD/MM/YY)

Analysis and Recommendation by UOBBF Representative

Please indicate if client is suitable to proceed with account opening

Yes No

Name and Signature of UOBBF Representative:

Date: _____ (DD/MM/YY)