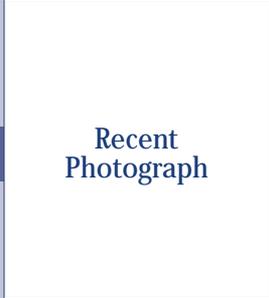


PORTFOLIO MANAGEMENT SERVICES

Account Opening Form - Individual



Please complete this form using black ink within the boxes in BLOCK LETTERS.

SECTION 1 - Individual Details

Title: Mr. Miss Mrs. Other

Principal Applicant's Name:

Applicant's Name (In Nepali):

Joint Applicant (if applicable):

Marital Status: Married Unmarried Divorced

Address:

Residential

Country		Zone		District	
VDC/SM/M		Ward No.		Block No.	
Mobile No.		Fax No.		Tole	
Home Ph.		Work Ph.		Email	

Permanent

Country		Zone		District	
VDC/SM/M		Ward No.		Block No.	
Mobile No.		Fax No.		Tole	
Home Ph.		Work Ph.		Email	

Father's Name:

Grandfather's Name:

Spouse's Name:

Date of Birth	<input type="text"/>	Place of Birth		Current age	<input type="text"/>
Nationality		PAN No.			
Citizenship No.		Issued Date		Issued Place	
Passport No.		Issued Date		Issued Place	

Educational Qualification: Post Graduate Graduate Higher Secondary Matriculation

Occupation: Salaried Business Professional Retired Housewife Other

if Currently Employed,

Employer's Name	<input style="width: 900px;" type="text"/>
Employer's Address	<input style="width: 900px;" type="text"/>
Designation	<input style="width: 900px;" type="text"/>

SECTION 2 - Bank Details

Account type: Current Call Savings Other

Name of Bank:	
Address:	
Account No.:	

(Note: In case of multiple accounts, please provide details on a separate sheet)

SECTION 3 - Type of Service

Service type: Discretionary(i) Non-discretionary(ii) Buy/Sell Advisory(iii) Administrative Service(iv)

- i. This is for clients who wish to delegate decision making on investment matters to our team of professional advisers.
- ii. The portfolio manager manages the fund in accordance with the expressed direction given by the client.
- iii. Buy/Sell Advisory is designed for clients who do not wish to receive investment advice but only give instructions for transactions to be executed on their behalf.
- iv. The administrative service is for clients who wish to receive ONLY the back office related services.

SECTION 4 - Investment Details

Investment Amount(NPR):

Expected time period the client wants to stay invested: Years: Months

Investment Objective: Regular Income Capital Growth Capital Growth & Regular Income Financing Specific Project
 Speculative Profits Other

Risk Appetite: Low Medium High

Expected Turnover: Low Medium High

Desired Portfolio Allocation: Debt Instruments Stocks/Shares Bank Deposits Mutual Fund

Name of the Preferred Product:

Systematic Investment Plan (*applicable as per product type*): Monthly Quarterly Bi-annually Annually

Systematic Withdrawal Plan (*applicable as per product type*): Monthly Quarterly Bi-annually Annually

Sources of Funds: Salary Inheritance Income from Investment/s Personal Savings Family Fund
 Sale of Assets Pension/Social Benefits Other

