

Attaching to and forming part of Proposal Form

Additional Information for Individual Clients

Name:

Date of Birth:

Place of Birth:

Nationality: Residence (Country of)

Personal Identification No. (e.g. Passport, National Identification Card or

Driver's Licence along with Social Security Number or equivalent, if non-resident)

Name & Address of current employer:

No. of years with current employer:

Telephone Nos. Home: Cell: Business:

Additional Information for Corporate Clients

Name of Company/Partnership/Association:

Address of Registered Office:

Trading Address:

Mailing Address:

Nature of Business or Partnership:

Date of Commencement of Business/

Names & Residential Addresses of Directors/Officers/Controllers/

For official use only:

Supporting documentation (individual clients)

- o Personal photographic identification (e.g. Passport, National Identification Card or Driver's Licence along with Social Security Number or equivalent, if non-resident)

- o Confirmation of permanent address (Recent original utility bill with full address – not more than 3 months old)

Supporting documentation (corporate clients)

- o Certified copy of corporate instruments (certificate and articles of incorporation or equivalent documents) or certified copy of partnership deed, registration of business name or equivalent documents

- o Personal photographic identification for each senior officer/controller (e.g. Passport, National Identification Card or Driver's Licence along with Social Security Number or equivalent, if non-resident). These must show, at a minimum, the person's photograph, date of birth and signature