



AFFIX ONE
LATEST
PASSPORT (OF
THE SETTLOR,
BENEFICIARIES &
DESIGNATED
REPRESENTATIVE)

EDUCATION TRUST ACCOUNT OPENING FORM

PERSONAL DATA

FULL NAME: _____

HOME ADDRESS: _____

MAILING ADDRESS– (if different from Home Address): _____

E-MAIL ADDRESS: _____

MOTHER'S MAIDEN NAME: _____

MARITAL STATUS: ☐ SINGLE ☐ MARRIED ☐ DIVORCED ☐ WIDOWED

GENDER: ☐ MALE ☐ FEMALE DATE OF BIRTH (DD/MM/YYYY): _____

STATE OF ORIGIN: _____ NATIONALITY: _____

SPOUSE NAME (IF APPLICABLE) _____

MOBILE PHONE: _____ HOME PHONE _____

ID TYPE: ☐ International Passport ☐ Driver's License ☐ National ID Card ☐ INEC Voter's Card

ID Number: _____ Issue Date: _____ Expiry Date _____ Place of Issue _____

EMPLOYMENT DETAILS

EMPLOYMENT STATUS: ☐ EMPLOYED ☐ SELF-EMPLOYED ☐ RETIRED ☐ UNEMPLOYED

EMPLOYER _____

EMPLOYER'S ADDRESS: _____

OFFICE PHONE: _____

SOURCE OF FUND

☐ SALARY ☐ BUSINESS ☐ GRATUITY ☐ PROPERTIES ☐ OTHERS PLEASE SPECIFY _____

ANNUAL INCOME/ TURNOVER _____

FEATURES OF THE PRODUCT

- Initial minimum contribution of N250,000 and additional monthly contribution to be determined by Settlor.
- Maturity is tied to the fulfillment of the object of the Trust as or else directed by the Settlor.
- It is more than a savings plan.
- The contributions fund and create a Trust for the benefit of the beneficiary and withdrawal from the Trust Fund is limited only to educational expenses for the beneficiary upon presentation of the child's school bills.
- Withdrawals shall not be made in the first one year of the Trust
- The settlor can create a standing order instruction for automatic deductions/contributions to fund the Trust.
- Third parties are prohibited from having access to the Trust Fund, although they are permitted to make contributions.
- Life Insurance policy of N1,000,000.00 (N1million) maximum cover per child.

**(To qualify for the Life Insurance policy, Settlor must have made the Total Contribution of N1,000,000 per child).*

S/N	NAME OF CHILD	DATE OF BIRTH	RELATIONSHIP TO SETTLOR	SEX	APPROXIMATE SHARE (%)

TRUST DEED CREATION DETAILS

I. Please state the purpose/objective of Trust

II. Proposed Name of Trust

III. Please state initial contribution to be provided

Name: _____

Signature: _____

Date: _____