

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	n Home Address):						
E-MAIL ADDRESS:							
MOTHER'S MAIDEN NAME:							
MARITAL STATUS:	SINGLE	MARRIE		DIVORCE	D	WIDOWE	ED
GENDER:	MALE	FEMALE		DATE OF	TE OF BIRTH (DD/MM/YYYY):		′YY):
STATE OF ORIGIN:			NATIONALITY:				
SPOUSE NAME (IF APPLICABLE):							
MOBILE PHONE:			HOME P	HONE:			
ID TYPE:	International Passport		Driver's License National		D Card	INEC Voter's Card	
ID NUMBER:			ISSUE DATE:				
EXPIRY DATE			PLACE OF ISSUE				
EMPLOYMENT DETAILS							
EMPLOYMENT STATUS:	EMPLOYED	SELF-EMF	PLOYED	RETIRE	ED	UNEMPL	.OYED
EMPLOYER							
EMPLOYER'S ADDRESS							
OFFICE PHONE							
SOURCE OF FUND							

SINGLE MARRIED DIVORCED WIDOWED 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 (%)
1					
2					
3					
4					
5					
6					
7					
8					
9					
10					

TRUST DEED CREATION DETAILS

I.	Please state t	າe purpose	objective of	Trust
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- ii. Proposed Name of Trust
- iii. Please state initial contribution to be provided

Name

Signature

Date