bankopeny

Client Profile (KCY) undefined

(1). General Details

Open an Account: Open an Account:

Open the Bank   Prefer particular bank(s):
account:

(2).Personal Information of undefined undefined

First Name: Last Name:

Date of Birth: Nationality:

City Of Residence: Address:

Country Of Residence:

Email: Contact Number:

Marital Status: Partner/Spouse:

Father: Mother:

Child Name with   Sibling:
Age:

(3).Educational Information of undefined undefined

University of institution: Graduate Year:

Profession:

(4). Professional Background of undefined undefined

Occupational Status:

Name of actual Employer: Your title:

Nature of your business: company's headquarter:

Employment Start   Company Website:
Date:

total compensation in USD: Number of employees:

Share in the company: PEP (political exposed person):

Previous Occupations:

Name of Previous employer: Your title:

business nature of the   Company's headquarter:
company:

Employment Start Date: Employment End Date:

Website of the company: shares in the company:

total compensation (in USD):	Number of employees

(5).Financial Information of undefined undefined

Avg Annual Income:	own real estate object:
Real estate investments value:	Real estate investments located:
Bankable assets:	Bankable assets value in USD:

source of your wealth:	

(6).Investment Objectives and Risk Profile:

Investment Objective:	Risk Tolerance:
Investment Experience:	Investment horizon in years:
Investment Knowledge and Experience:	

(7).Some details of the new account

Approx. amount transferred to the new bank:	Name of bank:
Transfers you intend to do every year:	Transfers you intend to receive every year:

(8).Joint signatory:

People will have signatory rights:

(9).Corporate Account

Name of the company:	Type of company:
Names of beneficial owners of the account:	names of directors of the company :
Name of the settlor of the trust/foundation:	

(10).Services

Introduce you to your desired bank:	Introduce you to a potential independent wealth manager:

Email Confirmation: pawan.mukati@newtechfusion.com