

Business Owner

Name of Primary Business: _____ Nature of Primary Business: _____

Annual business turnover (in USD): _____

Percentage ownership in business: _____

Names & percentage of ownership of other holders: _____

No. of employees: _____ No. of locations/offices: _____

Estimated annual net income (in USD): _____ No. of years in business: _____

Details of market penetration (in %): _____

Primary trade areas: _____

Any significant patents/inventions: _____

Is the company listed: Yes No Does the company receive revenues from Government contracts/licenses: Yes No

Others (Please choose one below): Retired Student Homemaker Other (Please specify): _____

If retired/Unemployed, please provide details of prior employment. For Homemaker / Student, please provide details for your spouse or guardian.

Name of Organization: _____

Nature of Employment: Self- Employed Salaried

Nature of Business: _____

Number of years in employment or business: _____

Annual Income (in USD): _____

Please note: If number of years in current organisation is less than 2 years, Please provide previous employment details:

Current source of wealth: _____

(III) Details of Wealth from other sources

Details of Inheritance

From whom was the inheritance received: _____

How was the wealth created: _____

Type of inheritance received (Real estate, Securities, Cash etc): _____

Amount inherited (in USD): _____ Percentage of ownership of wealth inherited: _____

Details of Investments

Where did source of wealth originate _____

What are the investments into (Real estate, stocks, mutual funds): _____

What is the current size of the investment(in USD): _____

What is the estimated capital appreciation on the investment: _____

How long have you been an investor: _____

(IV) Net Worth Details: Please provide approximate details of the following (in USD)

Total Assets: _____ Total Liabilities: _____

Net Worth*: _____

*Net Worth is calculated by subtracting your liabilities (Loans, Mortgages etc.) from your assets (Cash, Investments, Real Estate, Jewelry etc.)

(V) Details required for existing mandate holder on the account if applicable:

Complete Name: _____ Date of Birth:

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Profile: _____

Number of years in current profile: _____

If retired: Kindly provide previous profile details and number of years in previous profile.

I hereby confirm that the information given by me above is true and correct to the best of my knowledge.

Name of Account Holder

Signature of Account Holder

Date:

D	D	M	M	Y	Y	Y	Y
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