



SHARDD

H O L D I N G S

**INVESTMENT ACCOUNT OPENING FORM
PERSONAL / INDIVIDUAL**

Shardd Holdings Ltd.
Kemp House, 160 City Road
Greater London, London EC1V 2NX
United Kingdom

E: info@shardd-holdings.com

W: www.shardd-holdings.com

INVESTMENT APPLICATION FORM

AFFIX
PASSPORT
PICTURE
HERE



Please use capital letters and fill the form as completely and as accurately as possible. Use this application to open a new account for individuals. Please note that missing or incorrect information may delay your account opening.

Select the application option: New Client Existing Client Joint
Account Number (Existing Client):

PERSONAL DETAILS

Title: _____ Surname: _____
First Name: _____
Marital Status: Single Married Divorced Other
Date of Birth: _____ Gender: Male Female
Nationality: _____ Country of Residence: _____
Residential Address: _____
Email: _____ Contact Number: _____
Identification Documents: Passport National ID Driving Licence
Occupation: _____

SECOND APPLICANT

Title: _____ Surname: _____
First Name: _____
Marital Status: Single Married Divorced Other
Date of Birth: _____ Gender: Male Female
Nationality: _____ Country of Residence: _____
Residential Address: _____
Email: _____ Contact Number: _____
Identification Documents: Passport National ID Driving Licence
Occupation: _____

Mark (X) on appropriate boxes. The application form must be typed.

INVESTMENT OBJECTIVE AND RISK ASSESSMENT

How long do you plan to invest? 2 years 2-5 years More than 5 years

How much of a risk taker are you with investing? Low Medium High

What is the source of fund for the investment? Salary Savings Inheritance

Other, please specify:

What is your estimated net income per annum in British Pounds Sterling?

Below £50,000 £50,000-£100,000 More than £100,000

Other sources of income, please specify:

What is your estimated net worth? Below £1m £1m-£10m More than £10m

What is your overall knowledge about investment?

Limited Moderate Extensive Not at all

What are you primarily investing for?

Income Education Retirement Mortgage

Other, please specify:

What other investments do you currently have? Equity Bond Real Estate

Other, please specify:

KYC/Risk Profile: Low Medium High

INVESTMENT AT SHARDD HOLDINGS LTD.

Amount in Figures:

Amount in Words:

Duration:

Statement Preference: Post Email

How did you hear about us? Social Media Google Word of Mouth

If other, please specify:

BENEFICIARY DETAILS

NAME(s)	RELATIONSHIP	DATE OF BIRTH			CONTACT NO.	ADDRESS	%

Next to Kin (Name):

Contact Details:

TERMS AND CONDITIONS OF SHARDD HOLDINGS LTD. INVESTMENT ACCOUNT

1. Shardd Holdings Ltd. will manage the fund within the agreed mandate we have established with your investment objectives and risk profile.
2. Shardd Holdings Ltd. disclaims any liability for funds deposited by you which are subsequently found to have been derived from illegal sources or activities. You hereby confirm that the funds deposited are not derived from any illegal sources or activities and therefore indemnify Shardd Holdings Ltd. against any liability or loss incurred as a result of the funds deposited with us.
3. We would like to assure you that the details of your investments with us are kept confidential. Your privacy is a priority, which we respect and maintain.
4. Shardd Holdings Ltd. will charge a management fee and a performance fee as per the Investment Management Agreement.

DECLARATION

I/We have carefully read the Terms and Conditions for opening an Investment account with Shardd Holdings Ltd. and declare my/our acceptance of all conditions preserved in this document. I/We also certify that the information herein provided and the documents supplied are true to the best of my/our knowledge.

Applicant's Name:

Applicant's Signature:

Date:

DOCUMENT REQUIREMENT CHECKLIST

	YES	NO
Account Opening Form		
2x Passport Size Photographs		
Proof of Identity		
Proof of Address		

FOR OFFICIAL USE ONLY

	NAME & POSITION				SIGNATURE		DATE
Account Opened and Document Reviewed by							
Account Authorised by							
New Account No.	S	H					

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Send this application, along with any other required documents to:

Shardd Holdings Ltd. Kemp House, 160 City Road, Greater London, London EC1V 2NX, United Kingdom
or email us at info@shardd-holdings.com.

Mark (X) on appropriate boxes. The application form must be typed.