

# BUCKSWAY'S – APPLICATION FORM



## SECTION 1 – GENERAL INFORMATION

Date             Account Manager:  Control No. (Internal)

### NEW BUCKSWAY'S CUSTOMER

Send me information about other

Bucksway's Product & Service

### BUCKSWAY'S CUSTOMER

(Please tick the box to select any other

Bucksway's product or service that you have)

Bucksway's

Person

Others

Bucksway's security

Private Wealth Portfolio

PORTFOLIO CODE

## SECTION 2 – PRODUCT INFORMATION (PLEASE SELECT ALL THAT APPLY)

Bucksway's Partnership Investment Mini

amount you want to collect

Bucksway's Partnership Investment Medium

amount you want to collect

Bucksway's Partnership Investment Large

amount you want to collect

Bucksway's Partnership Investment Classic

amount you want to collect

## SECTION 3 – CUSTOMER INFORMATION

### FULL NAME

Title  Surname

First Name  Other Names

### IF APPLICANT IS A MINOR, PLEASE WRITE NAME OF SPONSOR BELOW

Title  Surname

First Name  Other Names

### RESIDENTIAL ADDRESS:

State  Country  DATE OF BIRTH: dd  mm  yyyy

Nationality  Occupation  Mother's Maiden Name

Mobile Phone Number  Email Address  Type of ID  ID Number

Next of Kin  Relationship With Next of Kin

Next of Kin's Phone Number  Next of Kin's Address  Next of Kin's Email Address

Preferred mode of communication Email  Telephone  Letter

### FOR JOINT APPLICANTS

Surname  Other Names

### CUSTOMER BANK

ACCOUNT INFORMATION: Account Name  Account Number

Bank Name  BVN Number

Dividends / Redemption payments will only be made to the bank account details stated above.

NATIONALITY  Nigeria  If not Nigeria please state Nationality

If you have residence in a jurisdiction other than Nigeria, please state the jurisdiction.



**SECTION 4 – DECLARATION BY APPLICANTS**

- I am at least 18 years old
- I have attached a cheque, bank draft, or evidence of fund transfer/ payment made payable in the name of my chosen fund BUCKSWAY'S with my name captured overleaf

**SECTION 5 – INDEMNITY FOR REDEMPTION REQUESTS/INSTRUCTION SENT BY BUCKSWAY'S CLIENTS THROUGH ELECTRONIC MAIL**

I am an investor in the Bucksway's \_\_\_\_\_

I hereby authorize the Bucksway's to honour redemption request and instruction sent by electronic mail in respect of my investment in the Company and in this regard confirm (email address of client ) as my designated email address for this purpose.

In consideration of the Bucksway's honouring my request and instruction sent by electronic mail, I hereby undertake to indemnify the Company against any loss, liabilities, damages, proceedings, cost or expenses of whatever nature that may be incurred by the Company as a result of any issue arising from the honouring of my redemption requests and instruction sent by electronic mail from my designated email address stated above.

Signature	Thumbprint	Joint Signatory	Thumbprint	
Name	Designation	Name	Designation	

**SECTION 6 APPLICATION CHECKLIST**

- Completed Application Form
- Proof of Address (Utility Bill, Tenancy Agreement, etc.)
- Sponsor's means of Identification (Driver's License, Intl Passport or National ID card)
- Means of Identification (Driver License, Intl Passport or National ID card)
- Recent Passport Photograph (not more than 6 month old)
- Evidence of Initial Deposit/Transfer (Copy)
- Birth Certificate (if application is a minor)

**SECTION 7 – PAYMENT DETAILS**

BANK	PARTNERSHIP INVESTMENT MIN BELOW (N1M)	PARTNERSHIP INVESTMENT MEDIUM (N1M – 19M)	PARTNERSHIP INVESTMENT (LARGE)	PARTNERSHIP INVESTEMNT (SPECIAL)



**SECTION 8 - ONLINE REDEMPTION CONSENT FORM & AGREEMENT**

**BANK ACCOUNT DETAILS**

Kindly note that all the redemption requests processed via the online redemption platform will be transferred to the bank account details as provided on your initial account opening document or update forms. In event no bank detail was provided or you wish to substitute the bank account on our records that will be done in writing by completing another consent/update form, which content shall take effect immediately upon submission and processing at any of our branches.

\* You are responsible for the accuracy of the bank account details provided and we shall not be liable for any loss that may arise due to the inaccuracy of the bank account details provided by you.

\* The Fund Manager is not obligated to confirm the status of the account to be credited with the redemption proceeds, we shall therefore not be liable in case of any delay experienced because of dormancy or inactivity of the Bank Account details you have provided for our records.

**TERMS AND CONDITIONS**

**By signing the box below and using this Portal, you are stating and acknowledging that you have read the Terms and Conditions and that you understand these Terms and Conditions and agree to be bound by them.**

**SIGNATURE OF UNIT HOLDER(S)**

Sign & Date	Sign & Date
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\*For Joint Account Holders: Please note that by executing this form, you have both given consent to BUCKSWAYS'S to effect: (1.) all redemption requests initiated by either party via the online redemption platform; and (2.) the transfer of online redemption proceeds to the bank account details provided on the Consent Form; without further recourse to either joint account holder. For this purpose, bank account details shall either be a joint bank account in the name of the joint account holders or an individual bank account belonging to either of the joint account holders.

**FOR REGISTRARS USE ONLY**

Signature Verified?  Yes  No

Access granted?  Yes  No

Account Officer Name/Signature: