

Momentum Investments

Personal details declaration

Important:

1. This declaration is also for a parent, legal guardian, entity representative, curator, executor, controlling person, founder of a trust, trustee, trust beneficiary, chief executive officer, shareholder, principal officer, director, manager or any person holding power of attorney for the investor.
2. We need a copy of the child's birth certificate or proof of your appointment as an authorised representative. You can refer to our Fica form for acceptable documentation.
3. Based on the information you provide, we may ask for additional information and documents.
4. If we cannot process any part of this instruction, we will inform you or your financial adviser.
5. You may not change any part of this form. When you correct any information you have completed, sign next to it.
6. The information in this form is part of the agreement for the investment number below or a new business application.

1: Investor details

My declaration is for the following investment number

Name and surname/Entity name of the investor

Identity/Passport/Registration number

2: My personal details

If not for myself, I act as

<input type="checkbox"/> Parent/Legal guardian	<input type="checkbox"/> Power of attorney	<input type="checkbox"/> Curator/Executor
<input type="checkbox"/> Controlling person	<input type="checkbox"/> Founder	<input type="checkbox"/> Authorised representative
<input type="checkbox"/> Trustee	<input type="checkbox"/> Trust beneficiary	<input type="checkbox"/> Principal officer
<input type="checkbox"/> Chief executive officer	<input type="checkbox"/> Manager director	<input type="checkbox"/> Shareholder

Other, give details

Are you an authorised signatory for this investment? Yes No

Surname

Previous surnames

Title

Full names

Preferred name

You must use alphabetical country codes where needed. You can get a list of the country codes from the South African Revenue Service (Sars) at sars.gov.za, or ask your financial adviser.

What identification document do you use?

<input type="checkbox"/> South African identity document	<input type="checkbox"/> Temporary South African identity document
<input type="checkbox"/> South African driver's license card	<input type="checkbox"/> Foreign passport

Identification number

If you are not using a South African identity document we need the expiry date of your identification document

If you use your passport, what is the country code of the issuing country

Nationality (ZAF if South Africa) Country of birth (ZAF if South Africa)

Citizenship (ZAF if South Africa) If you hold dual citizenship, give the other country's code

Date of birth Gender Male Female

