



# LYNEAR WEALTH MANAGEMENT (PVT) LIMITED

## Account Application Form – Individual / Joint Account

### Personal Information (First Applicant)

Type of Account: Sole Account  Joint Account

Title: Mr  Mrs  Ms  Dr  Other

Full Name:

Date of Birth:

D	D	M	M	Y	Y	Y	Y
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NIC/Passport No:

Nationality:

US Citizen or a Green Card holder? Yes  No  Politically exposed person (PEP)\*? Yes  No

Permanent Address:

Province:

Postal / Zip Code:

Country:

Status of the Permanent Address: Official  Owner  Lease / Rent  Other

Correspondence Address:

Province:

Postal / Zip Code:

Country:

E - Mail:

Telephone:

Mobile:

\*a PEP is a person who has been entrusted with a prominent public function related to/connected to such a person

### Know Your Customer (KYC) Profile (First Applicant)

Source of Funds: Salary / Professional Income  Family Remittances  Gift / Inheritance   
Rent Income  Business Turnover / Profit  Investment Proceeds   
Sale of Property  Other (please specify)

Occupation:

Place of Work:

Address:

### Know Your Customer (KYC) Profile (First Applicant)

Expected value of investment per annum:	Rs.1,000,000 to Rs. 5,000,0000 <input type="checkbox"/>	Rs.20,000,000 to Rs.50,000,0000 <input type="checkbox"/>
	Rs.5,000,000 to Rs.20,000,0000 <input type="checkbox"/>	Rs.50,000,000 and above <input type="checkbox"/>

Proof of Residency:	National Identity Card <input type="checkbox"/>	Driving License <input type="checkbox"/>	Telephone Bill <input type="checkbox"/>
	Utility Bill <input type="checkbox"/>	Bank Statement <input type="checkbox"/>	Credit Card Statement <input type="checkbox"/>

### Investor Bank Account Details (First Applicant)

Bank Name:			
Branch Name:		Swift Code:	
Account Name:			
Account Number:			

### Declaration

I hereby declare that the details furnished above are true and correct to the best of my knowledge and I undertake to inform you of any changes therein, immediately. In case any of the above information is found to be false or untrue or misleading or misrepresenting, I am aware that I may be held liable for it.

I authorise LYNEAR Wealth Management (Pvt) Limited to accept Subscription Request, Redemption Request and Switching Request between funds managed by the company via LYNEAR Wealth Unit Trust Investor Portal and/or email in order to transact Units on my behalf. I hereby undertake to indemnify and keep LYNEAR Wealth Management (Pvt) Limited, its, directors, officers and representatives indemnified against any loss, liability, damage, claim or demand incurred or sustained as a result of LYNEAR Wealth Management (Pvt) Limited acting upon such instructions which have been originated by me or purported to have been originated by me.

I understand that the value of units may fluctuate and capital gains or losses may occur due to market conditions.

I confirm that I have received, read and understood the Key Investor Information Document relating to the LYNEAR Wealth Unit Trust Fund that is being invested in.

### Required Documents for Submission

- Signed Account Application Form (soft copy version should be an un-editable PDF)
- NIC copy
- If the Permanent Address is different from the address stated on the NIC, billing proof is required (not older than 3 months from the date of application)

Signature

D	D	M	M	Y	Y	Y	Y
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Date

### Personal Information (Joint Applicant)

Type of Account: Sole Account  Joint Account

Title: Mr  Mrs  Ms  Dr  Other

Full Name:

Date of Birth: 

D	D	M	M	Y	Y	Y	Y
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 NIC/Passport No:

Nationality:

US Citizen or a Green Card holder? Yes  No  Politically exposed person (PEP)\*? Yes  No

Permanent Address:

Province: Postal / Zip Code:

Country:

Status of the Permanent Address: Official  Owner  Lease / Rent  Other

Correspondence Address:

Province: Postal / Zip Code:

Country:

E - Mail:

Telephone: Mobile:

\*a PEP is a person who has been entrusted with a prominent public function related to/connected to such a person

### Know Your Customer (KYC) Profile (Joint Applicant)

Source of Funds: Salary / Professional Income  Family Remittances  Gift / Inheritance   
 Rent Income  Business Turnover / Profit  Investment Proceeds   
 Sale of Property  Other (please specify)

Occupation:

Place of Work:

Address:

Expected value of investment per annum: Rs.1,000,000 to Rs. 5,000,000  Rs.20,000,000 to Rs.50,000,000   
 Rs.5,000,000 to Rs.20,000,000  Rs.50,000,000 and above

Proof of Residency: National Identity Card  Driving License  Telephone Bill   
 Utility Bill  Bank Statement  Credit Card Statement

### Investor Bank Account Details (Joint Applicant)

<b>Bank Name:</b>			
<b>Branch Name:</b>		<b>Swift Code:</b>	
<b>Account Name:</b>			
<b>Account Number:</b>			

### Declaration

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I authorise LYNEAR Wealth Management (Pvt) Limited to accept Subscription Request, Redemption Request and Switching Request between funds managed by the company via LYNEAR Wealth Unit Trust Investor Portal and/or email in order to transact Units on my behalf. I hereby undertake to indemnify and keep LYNEAR Wealth Management (Pvt) Limited, its, directors, officers and representatives indemnified against any loss, liability, damage, claim or demand incurred or sustained as a result of LYNEAR Wealth Management (Pvt) Limited acting upon such instructions which have been originated by me or purported to have been originated by me.

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**Signature**

D	D	M	M	Y	Y	Y	Y

**Date**