



LYNEAR WEALTH MANAGEMENT (PVT) LIMITED

Account Application Form – Minor

Personal Information (Minor Applicant)

Title: Mr Ms

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:

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 (Minor Applicant)

Source of Funds:

Salary / Professional Income

Family Remittances

Gift / Inheritance

Rent Income

Business Turnover / Profit

Investment Proceeds

Sale of Property

Other (please specify)

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 (Minor 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

Date

Investor Bank Account Details (Guardian)

Bank Name:

Branch Name:

Swift Code:

Account Name:

Account Number:

Declaration

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D	D	M	M	Y	Y	Y	Y

Date