

**Northstar Asset Management (Pty) Ltd - Client Profile Form for a Natural Person**

Please would you return to us duly completed and signed Client Profile Forms together with original or **certified copies** of the required original documents. Please complete all relevant sections in full using block letters. Any amendments made to the form must be initiated by the client.

Surname  Title

First names

Residential Address:  code

Postal Address (if different from residential)  code

SA Identity Number or Passport Number (if client is a foreigner)

Date of Birth  Nationality

Income tax number  Married  Community of Property

Source of Funds (indicate "X")  
 Inheritance  Savings  Salary  Bonus  Company Profits

Other - please specify

Tel (h):  code  Fax (h):  code

Tel (w):  code  Fax (w):  code

Tel (c):

email address:

Bank account details  
 Bank:  Branch code:

Account number:  Account type:

**If joint name registration (insert second name here)**

Surname  Title

First names

Residential Address  code

Postal Address (if different from residential)  code

SA Identity Number or Passport Number (if client is a foreigner):

Date of Birth  Nationality

Income tax number  Married  Community of Property

Tel (h):  code  Fax (h):  code

Tel (w):  code  Fax (w):  code

Tel (c):

email address:

I hereby confirm that the above information and attached documents are true and accurate.

Signature \_\_\_\_\_ Date \_\_\_\_\_

Name \_\_\_\_\_

<b>FICA Check list - include the following documents with return of this form:</b>
<b>NB: Originals or certified copies of the required original documents.</b>
<b>NB: Documents to be less than 3 months old.</b>
1 - Copy of ID document
2 - SARS document with name and tax number
3 - Proof of banking details (cancelled cheque or Bank statement)
4 - A <u>recent</u> document containing name & residential address eg: utility bill (rates, Telkom etc), bank statement or SARS doc