

PERSONAL CLIENT TAKE-ON SHEET

SURNAME:

FIRST NAMES/ (t/a):

RESIDENTIAL ADDRESS:

.....
(FICA : document reflecting client's name and residential address)

OCCUPATION:

EMPLOYER: (Name & address)

TELEPHONE No (W):

TELEPHONE No (H):

TELEPHONE No (Cell):

FAX No:

E-MAIL ADDRESS:

ID Nr:
(FICA: photocopy ID or valid passport)

VAT Nr:

RE: **Referred by :**

FICA: Source of Funds
(FICA: source of income and/or source of funds to be used in the professional relationship)

DATE:

ACTION REQUIRED:

CLIENT'S ROLE? (Active?/Auxiliary?/Passive?) **PRESCRIPTION ?**

OTHER DETAILS:

[Fee Rate: R 325.00 per 15 mins; Initial Deposit & Top-up Reserve : R 5 000.00]

MONTHLY NEWSLETTER ? Yes / No

I hereby agree to the fee rate above and mandate agreement on the other side of this form (or in a separate file attached to the same email, if electronic).

SIGNATURE: **DATE :**