



**CUSTOMER ACCOUNT INFORMATION FORM**

Account Opening Date \_\_\_\_\_

NEW APPLICATION  INFORMATION UPDATE

INDIVIDUAL  JOINT ACCOUNT

Account Name [Last Name] \_\_\_\_\_ [First Name] \_\_\_\_\_ [Middle Name] \_\_\_\_\_

Mailing Address \_\_\_\_\_

**Residential Address** \_\_\_\_\_

Name of Spouse \_\_\_\_\_

Tel. No. \_\_\_\_\_ Email Address \_\_\_\_\_ Mobile No. \_\_\_\_\_

Birthplace \_\_\_\_\_ Date of Birth \_\_\_\_\_ Nationality \_\_\_\_\_

Civil Status \_\_\_\_\_ Sex \_\_\_\_\_ Occupation \_\_\_\_\_ Tin \_\_\_\_\_

Employer \_\_\_\_\_

**Business Address** \_\_\_\_\_

Tel. No. \_\_\_\_\_ Fax No. \_\_\_\_\_

Initial Deposit \_\_\_\_\_ Customer's Bank \_\_\_\_\_

Identification Documents (any of the following with picture):

Driver's License  Passport  SSS ID  Others

Client's Specimen Signature:

1. \_\_\_\_\_ 2. \_\_\_\_\_

1. \_\_\_\_\_ 2. \_\_\_\_\_

**BANK ACCOUNT INFORMATION:**

Account Name Bank Branch Account Number

Account Name	Bank	Branch	Account Number

**SETTLEMENT INSTRUCTIONS:**

Registry of Certificates:  In Street  In Client's Name

Note: All Securities purchased by non-Metro Manila Clients shall be registered in street name.

**DISCLOSURES:**

Are you an officer/director of a publicly listed company?  YES  NO

If Yes, state the name of the company and position \_\_\_\_\_

Do you have an account with another Broker?  YES  NO

If Yes, state the name of Broker? \_\_\_\_\_

**INVESTMENT OBJECTIVE:**  Speculation  Long-Term  Growth

Preservation of Capital

ANNUAL INCOME \_\_\_\_\_ ASSETS \_\_\_\_\_ NET WORTH \_\_\_\_\_

I/We declare that the above information provided by me/us is true and correct. I/We agree to abide by the company's terms and conditions governing the account and the relevant rules and regulations governing the respective services linked to my/ our account which have been furnished to me/us

\_\_\_\_\_  
**Customer's Signature  
Over Printed Name**

\_\_\_\_\_  
**Customer's Signature  
over Printed Name**

**FOR MERIDIAN SECURITIES, INC. USE ONLY**

Name Signature of Salesman introducing the account \_\_\_\_\_

Name and Signature of officer or manager accepting the account \_\_\_\_\_

**Notes:** (1) For Joint accounts, please accomplish one (1) CAIF and two (1) Specimen Card for each of the holder.