

(1) ACCOUNT TYPE

Individual Joint/Tenants Custodian Corporate Other _____

(2) ACCOUNT OWNER

Surname: (Mr, Mrs, Ms, Miss) _____ Forename(s): _____

Date of Birth/Incorporation: ____/____/____ (day/mm/yr) Sex: Male Female

Postal Address: _____

Telephone Number: _____ Email: _____

Country of Citizenship: GH Other _____ Country of Residence: GH Other _____

ID Type: Passport Drivers License Voters ID Other ID Number: _____

Employment Status: Employed Unemployed Occupation: _____

(3) JOINT ACCOUNT OWNER

Surname: (Mr, Mrs, Ms, Miss) _____ Forename(s): _____

Date of Birth/Incorporation: ____/____/____ (day/mm/yr) Sex: Male Female

Telephone Number: _____ Email: _____

Country of Citizenship: GH Other _____ Country of Residence: GH Other _____

ID Type: Passport Drivers License Voters ID Other ID Number: _____

For joint accounts, an order is valid with the following signatures

Any Holder Both Principal

(4) NEXT OF KIN (BENEFICIARY)

Surname: (Mr, Mrs, Ms, Miss) _____ Forename(s): _____

Date of Birth ____/____/____ (day/mm/yr)

Sex: Male Female

Postal Address: _____

Telephone Number: _____ Email: _____

Country of Citizenship: GH Other _____ Country of Residence: GH Other _____

Relationship to Account Holder: Son Daughter Husband/Wife Other _____

(5) FINANCIAL PROFILE

What is your investment Objective?

You should choose your investments based on your objectives, time frame, and tolerance for market fluctuation. From short-term liquid investments that seek to preserve capital (accepting the lowest returns in exchange for stability) to longer-term investments that seek maximum growth (but can tolerate very wide fluctuations in market values), you can choose an approach that's best for you. Simply check the box below that most closely matches your investment objective.

Short Term Conservative Balanced Growth Aggressive Growth

Lower Risk



Higher Risk

Shorter Time Frame

Longer Time Frame

Short-Term: You seek to preserve your capital and can accept the lowest returns in exchange for price stability.

Conservative: You seek to minimize fluctuations in market values. You want to preserve your capital by taking an income-oriented approach with some potential for capital appreciation.

Balanced: You seek the potential for capital appreciation and some income and can withstand moderate fluctuations in market value.

Growth You have a preference for growth and can withstand significant fluctuations in market value.

Aggressive Growth: You seek aggressive growth and can tolerate wide fluctuations in market values, especially over the short term.

How long do you plan to invest?

< 1 year 1 year – 3 years 4 years – 10 years > 10 years

What is your estimated Annual Gross Income (GH¢ '000)?

< 2 2 – 10 10 – 20 > 20

(7) SIGNATURE SAMPLES

PLEASE BOLDLY SIGN YOUR SIGNATURE IN THE BOXES BELOW (*Sign both sides for joint account holders*)

1.
2.
3.

1.
2.
3.

(For joint account holders only)

ANY ONE of the above can effect transaction.

ALL THE ABOVE signatories must sign to effect transaction.

Fees & Commission Schedule (Applicable to stock and bond purchases)

Levies & Commissions (%)

Security	GSE	Market Dev.	CSD	SEC	SAS Commission	Total (Levies + Comm)
Equity	0.35	0.05	.015	0.15	1.25	1.95
Gov't Bonds	0.05	0.05	0.05	0.05	0.25	0.45
Corporate Bonds	0.05	0.05	0.05	0.05	1.25	1.45

For Office Use Only

Received By: _____

Approved By: _____

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