

Additional Details

Application Form



Affluence
INVESTMENT FUND

Please use this form to provide details if there are more than two Trustees, Directors, Individuals or Beneficial Owners for an Investment.

ADDITIONAL APPLICANT DETAILS

Please complete all details in full.

Investor Name / Entity:

Is this applicant a:

Trustee Director Individual Beneficial Owner

A beneficial owner is an Individual who ultimately owns or controls 25% or more of the Investor.

If Trustee or Director, are they a beneficial owner?

Yes No

If an Individual, please provide TFN:

Title:

Legal first name:

Middle names:

Legal last name:

Date of birth:

Country of citizenship:

Residential Address:

Street:

State:

Postcode:

Suburb:

Country:

Mobile phone:

Home phone:

Email address:

Is this Entity a sophisticated Investor for the purpose of Chapter 6D of the Corporations Act (2001) or a wholesale client for the purposes of Chapter 7 of the Corporations Act (2001)?

Yes No Unsure

If this Trustee or Director is a Beneficial owner please select the Source of Investment Funds:

Gainful employment Inheritance / gift
 Business activity Financial investments
 Superannuation saving Other

Would you like this person to have access to the investment in the Registry Investor Centre?

Yes No

Would you like this person to receive monthly fund updates via email?

Yes No