



# APPLICATION TO OPEN A PERSONAL ACCOUNT

## ACCOUNT TYPE

Please select which type of account you would like to open

CFD Trading

Share Trading

Please note, Share Trading is only available to individual's who are sole tax residents of Australia.

## PERSONAL INFORMATION

### 01 | PERSONAL DETAILS

Surname: \_\_\_\_\_ Previous address if less than three years (not a PO Box): \_\_\_\_\_

Forenames: \_\_\_\_\_

Title (Mr/Mrs/Ms/Other): \_\_\_\_\_ Date of birth: \_\_\_\_\_ Postcode: \_\_\_\_\_

Residential address (not a PO Box): \_\_\_\_\_ Address for correspondence (if different to Residential address): \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_ Postcode: \_\_\_\_\_

Time at current address: \_\_\_\_\_ Postcode: \_\_\_\_\_

Are you a sole tax resident of Australia?  Yes  No

List of nationality (s): \_\_\_\_\_

### 02 | CONTACT NUMBERS

Main contact number (mandatory): \_\_\_\_\_ Where did you hear about us?: \_\_\_\_\_

Mobile: \_\_\_\_\_ Email address (mandatory): \_\_\_\_\_

### 03 | EMPLOYMENT DETAILS

Employment Status:  Employed  Self-Employed  
 Retired  Unemployed

Occupation: \_\_\_\_\_ Industry: \_\_\_\_\_

## 04 | FINANCIAL DETAILS

Approx. annual income before tax: **A\$** \_\_\_\_\_

Approx. value of savings and investments (excluding property): **A\$** \_\_\_\_\_

Source of funds used for your trading with us:  Employment  Inheritance  
 Investment  Other (please specify)

Other: \_\_\_\_\_

Purpose of trading account/s:  Short medium term speculation  Hedging purposes  
 Long term growth  Diversified investment

## YOUR KNOWLEDGE AND EXPERIENCE

### RELEVANT EXPERIENCE

Please provide accurate information. Depending on your level of experience, we may need to ask you further questions once you have completed the application form.

1. Over the past three years, to what extent have you traded the following products?

Shares and bonds	<input type="checkbox"/> More than 20 times	<input type="checkbox"/> 10 to 20 times	<input type="checkbox"/> Less than 10 times
Exchange-traded derivatives (e.g. warrants, futures or options)	<input type="checkbox"/> More than 20 times	<input type="checkbox"/> 10 to 20 times	<input type="checkbox"/> Less than 10 times
OTC derivatives (e.g. CFDs including forex)	<input type="checkbox"/> More than 20 times	<input type="checkbox"/> 10 to 20 times	<input type="checkbox"/> Less than 10 times

2. How have you mostly traded these products?  Independently or with advice  Using managed funds

### PROFESSIONAL & EDUCATIONAL EXPERIENCE

3. Do you have any experience or qualifications relevant to the understanding of our products?

Yes, from a relevant role in a financial institution  Yes, a relevant professional qualification or education  
 Yes, both of above  No

## DECLARATIONS

As applicable, I have received and understood the Margin Trading Product Disclosure Statement and the Customer Agreement, and/or the Share Trading Customer Agreement. I hereby consent to be bound by the terms of the relevant Customer Agreement in my dealings with IG Markets.

I understand the nature and risks associated with trading CFDs and/or securities and I hereby confirm I have read and understood and agree to be bound by the terms of the Risk Disclosure Notice.

I consent to IG verifying my identity by disclosing my personal information such as my name, date of birth, and address to a credit reporting agency (CRA) or identity verification service to obtain an assessment of whether my personal information provided matches the information held by them or other identity verification sources. I hereby give my full and informed consent to IG to provide my personal information to a credit reporting agency or identity verification service for the purposes of undertaking electronic identity verification.

If relevant, I consent to IG Markets obtaining from a credit reporting agency a consumer and/or commercial credit report about me in connection with a Margin Trading Account Application. I also confirm that I have read, understood and agree to the matters set out at section 21 and section 29 of the Margin Trading Customer Agreement.

I have also read, understood and consent to the Privacy Policy, including any offshore disclosure of my personal information specified therein.

I confirm that I will not supply, show or make available or permit to be supplied, shown or made available any market data from any service therefore, provided by IG Markets, to any third party in any manner. I will not use any data from the service to establish, maintain or provide, or assist in providing a market for trading in securities or other financial instruments which is not authorised by law.

I confirm I am aged 18 years or over and I undertake to notify IG if there is any change to my status such that any one or more of the statements herein become untrue.



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



Once you have completed your details, please:

- Print this form
- Sign it (in the presence of an independent witness if you are an individual)
- Return it to us