



APPLICATION TO OPEN A MARGIN TRADING ACCOUNT (PERSONAL)

PERSONAL INFORMATION

Please complete all details. Our regulator requires that we obtain this information from you, and we are unable to open your account without it.

01 | PERSONAL DETAILS

Surname: _____ Home address: _____

Forenames: _____

Title (Mr/Mrs/Ms/Other): _____ Postcode: _____

Date of birth: _____ Country: _____

Nationality: _____

02 | CONTACT NUMBERS

Main contact number (mandatory): _____ Email address (mandatory): _____

03 | EMPLOYMENT DETAILS

Employment Status: Employed Self-Employed Retired Unemployed

Occupation: _____ Industry: _____

04 | FINANCIAL DETAILS

Approx. annual income before tax: **CHF** _____ Approx. value of savings and investments (excluding property): **CHF** _____

Source of funds: Employment Inheritance Investment Other (please specify)

Other: _____

05 | STATEMENT INSTRUCTIONS

In the absence of other instructions from you, we will send statements by email. If you would prefer to receive these by post, please tick this box:
Please note that postal statements will incur a charge of CHF1 per statement.

YOUR KNOWLEDGE AND EXPERIENCE

Please complete the following section so we can assess the appropriateness of our services for you.

1. To what extent over the past three years have you traded the following?

- | | | | |
|---|---|--|---|
| Shares and/or bonds | <input type="checkbox"/> More than 25 times | <input type="checkbox"/> 10 - 25 times | <input type="checkbox"/> Less than 10 times |
| Exchange-traded derivatives (eg warrants, futures or options) | <input type="checkbox"/> More than 25 times | <input type="checkbox"/> 10 - 25 times | <input type="checkbox"/> Less than 10 times |
| OTC derivatives (eg CFDs, forex, binaries) | <input type="checkbox"/> More than 25 times | <input type="checkbox"/> 10 - 25 times | <input type="checkbox"/> Less than 10 times |

2. How have you mostly traded these products? Execution-only and/or Advisory Managed

3. Do you have particular experience or qualifications which would assist your understanding of our services? Yes No

If yes:

Occupational experience: I have a good knowledge of OTC, leveraged derivatives through a relevant role working in a financial institution

Qualifications: I have a good knowledge of OTC, leveraged derivatives because of a relevant professional qualification and/or my education or relevant training

DECLARATION

DECLARATION OF STATUS OF 'NON-US PERSON'

A US Person is someone who: is a US citizen (with single, dual or multiple nationality) or; holds '**resident alien**' status (eg a permanent residence permit ('**Green Card**')) or; has frequently been physically present in the US in the current year and the previous two years or; is liable for taxation in the US for any other reason (eg dual residence, joint tax declaration with spouse, refusal of US citizenship).

I hereby declare to IG Bank S.A. that:

- I am a non-US Person
- I am a US Person. I hereby declare that I abide by all tax requirements of the US, in particular the requirements of the US Internal Revenue Service, to ensure that all my assets and income are declared according to current US tax regulations

I understand the risks of CFD trading and I have read the Risk Disclosure Notice, which I agree will be provided to me on the IG website. I have read, understood and agree to be bound by the Customer Agreement, which I agree will be provided to me on the IG website. I also agree to IG's Privacy Policy.

 Signature: _____ Date: _____

ALL APPLICATIONS MUST BE ACCOMPANIED BY:

A RECENT COPY OF A VALID OFFICIAL IDENTIFICATION DOCUMENT WITH A PHOTOGRAPH (YOUR PASSPORT, IDENTITY CARD OR SIMILAR DOCUMENT) CLEARLY SHOWING YOUR SIGNATURE AND DULY CERTIFIED BY A NOTARY, A PUBLIC AUTHORITY, USING THE YELLOW IDENTIFICATION SERVICE OR CERTIFICATE OF LEGITIMISATION (FOUND ON OUR WEBSITE)

We may need to contact you for further information/documentation



Once you have completed your details, please:

- Print this form
- Sign it
- Return it to us