



INDIVIDUAL APPLICANT INFORMATION:

Title: _____ Surname: _____

Gender:

M F

Other Names: _____

Date Of Birth: _____

Day/ Mo/ Year

--	--	--	--	--	--

Marital Status:

Married Single Divorced Widowed

Postal Address: _____

Postal Code: _____

Email Address: _____

Telephone (Home): _____ Mobile Number: _____

Telephone (Work): _____ Extension: _____

Are you self employed? Yes No Name of business/Employer _____

Identification Document: I.D Card Passport _____

Country of Residency: _____ Pin # for Kenyan residence _____

REMITTANCE INFORMATION:

Regular contributions. Kshs: _____

NOTE: CASH NOT ACCEPTABLE

Mode of remittance :

Bankers Order Salary Deduction Cheque Direct debit

Frequency:

Monthly Quarterly Semi-annually Annually

Lumpsum Contribution : Kshs: _____

BENEFICIARY INFORMATION:

Full Name: _____ ID/PP NO: _____ Relationship: _____

Address: _____ Percentage: _____

Email: _____ Telephone No: _____

Full Name: _____ ID/PP NO: _____ Relationship: _____

Address: _____ Percentage: _____

Email: _____ Telephone No: _____

MANAGEMENT FEE : (On funds under management)

AMANA MYPENSION - 1.5% P.A

DECLARATION AND SIGNATURE (S):

I hereby confirm that the statements made herein are true and complete to the best of my knowledge. Further, I understand that my membership in the Scheme is on the terms and conditions of the Amana Personal Pension Plan Trust Deed & Rules.

SIGNATURE: _____ **DATE** _____

How did you hear about Amana Capital? ___ Family/friend(s) ___ Tv/Radio Ad ___ Newspaper ___ Social Media
Other (Please specify) _____

***** FOR OFFICIAL USE ONLY *****

NAME OF FINANCIAL ADVISOR: _____

NAME OF INSTITUTION: _____

EMAIL : _____

SIGNATURE: _____ **DATE** _____

FORM RECEIVED: _____

APPLICATION NO: _____

STAFF INITIALS: _____ **DATE** _____





Date: _____

Dear Sir/ Madam:

Re: Account(s). _____

I, _____ (full names), hereby request Amana Capital Limited, ("the Fund Manager") to act upon my scanned and signed e-mail instructions ("Instructions"), as advised to the Fund Manager in writing from time to time, in regard to my investment account(s) with the Fund Manager, including, without limitation matters related to funds transfers to, from and within the Fund Manager, breaking of investments, rollovers and settlements of securities, believed by the Fund Manager to be issued by or originated from me if such Instructions are signed by me irrespective of whether such instructions are genuine and/or authorized. So long as the Fund Manager believes in good faith that the instructions are genuine and authorized, the Fund Manager may act upon the instructions and shall not be required to obtain my confirmation that such instructions are genuine.

The Fund Manager may, however, at its sole discretions, decline to act upon the instructions unless and until confirmation, in a form and substance acceptable to the Fund Manager, has been obtained from me.

I agree to indemnify the Fund Manager, its directors, officers and employees against any loss, cost, damage, expenses, liability or proceedings, which it/they may incur or suffer (directly or indirectly) as a result of the Fund Manager or any such, director, officer, or employee acting upon or refraining from acting upon instructions and I acknowledge that neither the Fund Manager nor any of its directors, officers, or employees shall be under any liability to me or any other person for any loss or damage caused as a result (including by reason of delay), direct or indirect, of acting upon or refraining from action upon instructions or in construing or processing such instructions in error, and the Fund Manager may debit any of my account(s) with any amount paid out pursuant to the receipt of instructions. I undertake to confirm by letter, upon your request, all transactions having taken place from time to time pursuant to the instructions.

The Fund Manager shall cease to be under obligation to comply with the instructions if the Fund Manager gives me written notice to such effect. Such notice shall be effective upon the lapse of twenty-four hours from the date of my receipt or seven days from the date of notice, whichever is earlier.

Yours faithfully,

Signature : _____