

AUTHORISED REPRESENTATIVE APPENDIX

1. GENERAL INFORMATION					
Title:		Name:		Surname:	
I.D./Passport Number:		Nationality:		Place of Birth:	
Country of Issue:		Date of Issue:		Date of Birth:	
<input type="checkbox"/> Cyprus Resident <input type="checkbox"/> Non Resident		Relationship to Client:			
Home Address:					
Postal Code:		Town/City:		Country:	
Tel. No.:	Home	Work	Mobile	Fax	
E-mail:					
Correspondence Address <input type="checkbox"/> Home <input type="checkbox"/> Work <input type="checkbox"/> Hold Mail <input type="checkbox"/> Other (Please state below)					
Correspondence Postal Address:					
Postal Code:		Town/City:		Country:	
Public position hold or held in the last 12 months or close relative of such individual (only for natural persons not residing in the Republic): <input type="checkbox"/> Yes <input type="checkbox"/> No					
If yes, please give details:					
2. QUESTIONNAIRE					
KNOWLEDGE & EXPERIENCE					
QUESTION	ANSWER	FOR ONEPLUS USE ONLY			
1. What type of financial instruments you are familiar with / you have invested in (select all that apply and mark 1 → familiar with, 2 → invested in)					
Cash Deposits and Government Bonds					
Money market funds					
Real Estate Property					
Capital Guarantee Products					
Bond and bond funds					
Shares					
Mutual Funds of Shares					
Foreign Currency					
Precious Metals /Commodities					
Derivatives					
2. In what markets have you already invested					
None, I have not previously done any investments					
Home country					
Developed markets (e.g. USA and Western Europe)					
Emerging Markets					
3. By which method have you already invested					
None, I have not previously done any investments					
Execution only, I decide on my own where to invest					
Based on investment advice I receive					
Discretionary / Asset Management					

4. What is the value of your current investment portfolio (if none select first choice)		
Less than €50,000		
€50,000 – €200,000		
€200,000 – €500,000		
Over 500,000		
5. What is the average value of your financial transactions		
Less than €5,000		
€5,000 – €20,000		
€20,000 – €50,000		
€50,000 – €100,000		
Over €100,000		
6. How many financial transactions have you done yearly on average in each of the last 5 years		
Less than 10		
10 – 50		
50 – 100		
Over 100		
7. Education level		
High school		
College		
University		
Post Graduate		
Professional Qualification		
8. Overall how would you evaluate your investment knowledge and experience		
Extremely limited – Little or no knowledge		
Limited – I understand the basics		
Average – I understand the main investment principles		
Good – I understand most investment principles		
Very good – I am an investment professional / professional investor / frequent trader		

AUTHORISED REPRESENTATIVES		
NAME	SIGNATURE	DATE

1. Name:
 I.D./Passport Number:.....

2. Name:
 I.D./Passport Number:.....

WITNESSES		
NAME	SIGNATURE	DATE

1. Name:
 I.D. / Passport Number:

2. Name:
 I.D. / Passport Number: