

客戶資料更新表格 Client Information Update Form

本公司會根據表格載有的資料更新客戶記錄，閣下只須填寫需要更新之項目(請劃去不適用之項目)。

The information provided by the customer in this form will be used to update the Company's customer records. You only need to complete information field(s) where update(s) is/are necessary (please cross out any inappropriate items).

個人資料 Personal Information			
客戶姓名 Client Name		賬戶號碼 Account No.	
請在以下及背面表格註冊您的銀行賬戶資料，包括不同貨幣的相關賬戶號碼。此註冊賬戶列表中的銀行賬戶將用作款項轉移，否則我們必須要收到閣下簽署作實的書面授權通知，方能繼續處理。而在所列之銀行賬戶進行匯款給我們將獲加快處理。請在“賬戶貨幣”一欄填寫適用之貨幣。請提供銀行證明文件，該文件需清楚顯示銀行名稱、客戶姓名及銀行戶口號碼。Please list below and overleaf all bank accounts in your name that you wish to register with us, including different currency account numbers. Bank accounts on this list can be used to receive funds withdrawn from your Funderstone account, otherwise we will need signed written authorization from you. Remitting funds to us from these same accounts will also result in faster handling. For “Account Currency” write multi or the applicable currency. Please provide relevant bank proof, such as a bank statement or notification that clearly displays the bank name, client name, and bank account number.			
銀行戶口資料 Bank Account Details	銀行名稱 Name of Bank		
銀行賬戶名稱 Bank A/C Name			
賬戶貨幣 Account Currency		銀行賬戶號碼 Bank A/C No.	
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手提電話 Mobile No.		住宅電話 Home Tel. No.	電郵地址 Email Address
居住地址 Residential Address	如需更新住址，請提供最近三個月內發出之住址證明。(如銀行月結單/水電費單/電話費單) For update of residential address, please provide the address proof (e.g. Bank statement/utility bill/telephone bill) issued within the latest 3 months. (郵政信箱不能作為居住地址。PO Box is not accepted as residential address)		
通訊地址 Correspondence Address			
互聯網交易服務 Internet Trading Service	<input type="checkbox"/> 申請 Application <input type="checkbox"/> 取消 cancellation		
收取賬戶結單方法 Statement Collection Method	<input type="checkbox"/> 電子郵件 by E-mail <input type="checkbox"/> 郵寄 by Post		

受僱資料 Employment Details			
<input type="checkbox"/> 受僱 Employed <input type="checkbox"/> 無業 Unemployed <input type="checkbox"/> 自僱 Self-employed <input type="checkbox"/> 退休 Retired <input type="checkbox"/> 主婦 Housewife <input type="checkbox"/> 學生 Student			
僱主名稱 Employer Name			
職位 Position		業務性質 Business Nature	
辦事處地址 Office Address		電話 Telephone No.	
如客戶是香港證監會註冊持牌法團代表、註冊機構的主管人員、受僱於香港證監會註冊之持牌法團或註冊機構，請提供僱主的同意書。 If you are a Representative of Licensed Corporation, Executive Officer of Registered Institution under Hong Kong SFC, employed with Licensed Corporation or Registered Institution under Hong Kong SFC, please provide a consent letter from your employer.			

財政狀況、投資概況及稅務責任 Financial Status, Investment Profile and Tax Obligations			
估計資產淨值 Estimated Net Worth		估計年收入 Estimated Annual Income	
投資目標 Investment Objectives	<input type="checkbox"/> 證券戶口 For securities account	<input type="checkbox"/> 長線 Long Term <input type="checkbox"/> 短線 Short Term <input type="checkbox"/> 中線 Medium	<input type="checkbox"/> 股息回報 Dividend Yield
	<input type="checkbox"/> 所有投資戶口 For all accounts	<input type="checkbox"/> 資本增值 Capital Gain <input type="checkbox"/> 對沖 Hedging	<input type="checkbox"/> 投機 Speculation
擁有合法居民身份的國家/地區 Country/Region of Legal Residence	<input type="checkbox"/> 香港 HKSAR <input type="checkbox"/> 其他 Other: _____		
列出所有擁有公民身份的國家 Country(ies) of Citizenship (list all)	<input type="checkbox"/> 中國 China (PRC) <input type="checkbox"/> 美國 USA <input type="checkbox"/> 其他 Other: _____		

其他 Others	

其他銀行戶口資料 Other Bank Account Details

銀行名稱 Name of Bank			
銀行賬戶名稱 Bank A/C Name			
賬戶貨幣 Account Currency		銀行賬戶號碼 Bank A/C No.	
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For Company use only					
	Date / Time	SV By	Reviewed By	Input By	Checked By
<input type="checkbox"/> Original / Fax					
<input type="checkbox"/> Telephone (Confirmed by : _____)					
# _____ Date/Time: _____					