



KINONDONI ROAD,
1ST FLOOR, TOGO TOWER
P.O. BOX 4441,
DAR ES SALAAM-TANZANIA
TEL: +255 22 266 6031
EMAIL: info@optimacorporate.co.tz
WEBSITE: www.optimacorporate.co.tz

Policy for acceptance of clients

Client's Name

We are required to obtain the following information from you before we can offer our brokerage service.

PHONE

EMAIL

WEB

KINONDONI ROAD, TOGO TOWER, P.O. Box 4441 Dar es Salaam

+255 22 266 6031

Info@optimacorporate.co.tz

www.optimacorporate.co.tz

PLEASE NOTE INFORMATION SHOULD BE FILLED IN BLOCK CAPITAL LETTERS

Policy Details

Policyholder/Trustee

Title: Mr. Mrs. Miss. Dr. Prof

Surname

Forenames(s)

Physical Address

Mobile

Mail

I.D (Retail/Inst)

Date of Birth

Nationality

Bank Name:

Branch Name:

Account Name:

Account No:

Career Orientation

Signature & Date

Full Name

For Office Use Only

Investment Mandate Sign Off

Investment Officer

Investment Classification: Retail

Professional

Institution

Benchmark

Signed

Dated

Compliance

AML documentation in order

Client Screening Completed

Signed

Dated