Jarvis CFD Application Form

TO OPEN A JARVIS CFD TRADING ACCOUNT PLEASE COMPLETE THIS FORM IN FULL AND RETURN IT TO JARVIS INVESTMENT MANAGEMENT PLC.

If the account is to be operated on a joint basis each person must complete and sign the form.

1. Application Form
TO BE COMPLETED BY ALL APPLICANTS

Investor Details

	1st Applicant	2nd Applicant
Title (Mr/Mrs/Miss/Ms)		
Surname		
Forename(s)		

Permanent residential address

Postcode

Date of birth

Telephone (Home)

Telephone (Work)

Telephone (Mobile)

Email

Contract Notes by email ☐ or post ☐ (✓ one box)

If you have been living at the above address for less than 12 months please provide your previous address

Postcode

Debit Card Details

Please complete this form where you intend to give instructions to make payment by Maestro or Visa/Delta Card on your account and you would like us to keep a record of your card details.

Debit card details for processing payment

Card Type: Maestro ☐ Visa/Delta ☐ (✓ one box)

Card No (Centre No.)

3 digit security code

Name on card

Valid from ☐☐/☐☐ Expiry date ☐☐/☐☐

Issue number (Maestro only)

Deposit amount £ (min £500 deposit)

2. Account Declaration
TO BE COMPLETED BY ALL APPLICANTS

Money Laundering

You may undertake a search with Experian for the purposes of verifying my identity. To do so Experian may check the details I supply against any particulars on any database (public or otherwise) to which they have access. They may also use my details in the future to assist other companies for verification purposes. A record of the search will be retained.

Authorisation

I confirm that the information is true and complete and authorise the Account Manager to make any credit reference and enquiries in connection with this application. I have read, understood and acknowledge the risk warning issued by the Account Manager. I agree to be bound by the enclosed Terms and Conditions.

Signed 1st Applicant Date

Signed 2nd Applicant Date

3. Client Classification

In accordance with the MiFID Directive, Jarvis has to segment and classify all its clients into three categories: Retail, Professional and Eligible Counterparty.

All clients will, as a point of departure, be classified as Retail Clients, in order to grant them the highest level of regulatory protection.

4. Purpose and Scope of Client Relationship (Mandatory)

Purpose and scope of applying for an account with Jarvis

☐ Capital preservation/hedging (Minimise the potential for any loss of principal)

☐ Growth (Increase investment value over time while accepting price fluctuations)

☐ Speculation (Assume the highest degree of risk for potentially higher returns)

5. Signature

I/We declare by my/our signature(s):

- To have read, understood and agreed to the General Business Terms (including the Risk Disclosure Statement) and all of its contents;
- To understand and accept that the General Business Terms and any other relevant terms and conditions (as amended from time to time) apply to my/our entire trading relationship with Jarvis.
- To have received, read and understood the product information material relating to the relevant products;
- To have received additional in-depth verbal information about the products and the inherent possibilities and risks if so requested;
- To have received satisfactory answers to all my/our questions regarding the terms, conditions and other issues relating to the relevant products.

Furthermore I/we confirm:

- That the information provided by me/us and inserted in this form is correct;
- That I/we have supplied Jarvis with correct and adequate information in the Client Application Form or as otherwise requested by Jarvis Investment;
- That the investment amount has been chosen by me/us taking my/our total financial circumstances into consideration and is by me/us considered reasonable under such circumstances;
- That I/we acknowledge that Jarvis is not able to provide advice.
- That Jarvis Investment is entitled to send newsletters or other investment material to me/us by e-mail, or similar electronic messaging services;
- I am over 18 years of age;
- I understand that CFDs carry a high level of risk to my capital;
- I understand that CFDs are a leveraged or geared product, which means I may lose more than my initial investment;
- In light of my circumstances and financial position, I confirm that CFDs are a suitable product for my investment objectives. If in doubt I will seek independent advice.

Date

Signature

On completion please return to:
The Account Manager, Jarvis Investment Management plc,
78 Mount Ephraim, Tunbridge Wells, Kent TN4 8BS.

Additional forms are available on request.