

CHANGE OF ACCOUNT PARTICULARS FORM (For Individual Account Only)

帳戶資料更改表格 (僅適用於個人帳戶)

To: Mont Avenir Capital Limited

致：未來金融有限公司

Client Name 客戶名稱: _____ Account Number 客戶號碼: _____

Effective Date 生效日期: _____

Details of Change(s) 更改資料內容 (Please complete the relevant section(s) only 請只填寫所需部份)

Replace 更改	Add 加入	Delete 取消	Account Particulars 帳戶資料
			<u>Address 地址</u> (Please enclose address proof within 3 months 請附上最近三個月內之地址證明)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Residential Address 住址 _____ _____
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Correspondence Address 通訊地址 _____ _____
			<u>Contact Details 聯絡資料</u>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Residential No. 住宅電話號碼 _____
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Office No. 辦事處電話號碼 _____
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Mobile Phone No. 手提電話號碼 _____
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Facsimile No. 傳真號碼 _____
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Email Address 電郵地址 _____
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<u>Client Standing Settlement Bank Details 客戶常設交收銀行資料</u>
			Name of Bank 銀行名稱 _____
			Bank Account Number 銀行帳號 _____
			Account Type / Currency 帳戶類別/貨幣 _____
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<u>Authorized Person 獲授權人士</u>
			Authorized Person Name 獲授權人士名稱 _____
			ID Card/Passport No. 身份證/護照號碼 _____
			Nationality 國籍 _____
			AP Phone No. 獲授權人士電話號碼 _____

Change of Employment Status 更改工作狀況			
Education Level 教育程度 <input type="checkbox"/> University or above 大學或以上 <input type="checkbox"/> Secondary 中學 <input type="checkbox"/> Primary or below 小學或以下 <input type="checkbox"/> Others 其他 _____			
Employment Status 就業狀況 <input type="checkbox"/> Full-time 全職 <input type="checkbox"/> Part-time 兼職 <input type="checkbox"/> Self-Employed 自僱 <input type="checkbox"/> Student 學生 <input type="checkbox"/> Housewife 主婦 <input type="checkbox"/> Retired 退休 <input type="checkbox"/> Unemployed 待業 <input type="checkbox"/> Others 其他 _____			
Employment Information 受僱資料 (For those are full-time / part-time / self-employed, please complete) (如屬全職 / 兼職 / 自僱，請填寫) (Full-time investors (or equivalent) is not acceptable as employment information 不可填寫全職投資者 (或其等同) 為受僱資料)			
Company Name 公司名稱			
Company Address 公司地址			
Company Website (if any) 公司網頁 (如有)		Industry 行業	
Office Tel. 辦公室電話	Position 職位	Year(s) of Employed 任職年期	
Change of Financial Position 更改財政狀況			
Source of Income 收入來源 (one or more item(s) 可選多項) <input type="checkbox"/> Salary 薪金 <input type="checkbox"/> Business Profit 企業營利 <input type="checkbox"/> Rental Income 租金收入 <input type="checkbox"/> Dividend / Interest 股息/利息 <input type="checkbox"/> Retirement Fund 退休基金 <input type="checkbox"/> Others 其他: _____	Annual Income (HKD) 每年收入 (港幣) <input type="checkbox"/> < 120,000 <input type="checkbox"/> 120,000 – 360,000 <input type="checkbox"/> 360,001 – 600,000 <input type="checkbox"/> 600,001 – 1,200,000 <input type="checkbox"/> 1,200,001 – 5,000,000 <input type="checkbox"/> 5,000,001 – 10,000,000 <input type="checkbox"/> > 10,000,000	Other Assets 其他資產 (one or more item(s) 可選多項) <input type="checkbox"/> Cash / Deposit 現金 / 存款 <input type="checkbox"/> Securities 證券 <input type="checkbox"/> Property 物業 <input type="checkbox"/> Vehicles 車輛 <input type="checkbox"/> Bonds / Funds 債券 / 基金 <input type="checkbox"/> Others 其他: _____	Total Net Worth (HKD) 總資產淨值 (港幣) <input type="checkbox"/> < 100,000 <input type="checkbox"/> 100,000 – 500,000 <input type="checkbox"/> 500,001 – 1,000,000 <input type="checkbox"/> 1,000,001 – 5,000,000 <input type="checkbox"/> 5,000,001 – 10,000,000 <input type="checkbox"/> 10,000,001 – 50,000,000 <input type="checkbox"/> > 50,000,000

E-statement Services Application 收取 / 取消收取電子結單

- I/We hereby instruct you to send to me/us the daily combined statements of account, contract notes and monthly statements of account via electronic mail (e-mail) and acknowledge that
本人/吾等謹此指示您以電子形式 (電郵) 發送綜合日結單、成交單據及月結單給本人/吾等並確認：
- Once the application is processed, I/we would no longer receive a hard copy of the daily combined statements of account, contract notes and monthly statements of account;
申請一經處理，本人/吾等將不會再收到綜合日結單、成交單據及月結單的印刷本；
 - Mont Avenir Capital Limited shall not be responsible for any delay or failure in the transmission of the daily combined statements of account, contract notes and monthly statements of account, or your receipt of such information due to either a breakdown or failure of transmission of communication facilities, or any unreliable medium of communication or to any uncontrollable or unanticipated cause or other causes.
未來金融有限公司不對因通訊設施傳輸故障或故障而導致綜合日結單、成交單據及月結單傳輸延遲或失敗，或您收到此類資訊負責，或任何不可靠的通訊媒介或任何無法控制或不可預見的原因或其他原因。

MONT AVENIR

未 來 金 融

Mont Avenir Capital Limited 未來金融有限公司 CE No. BOG353

- I/We would like to cancel receiving the daily combined statements of account, contract notes and monthly statements of account via electronic mail (e-mail).

本人/吾等希望取消以電子形式 (電郵) 收取綜合日結單、成交單據及月結單。

- Other Change(s) 其他更改

Details 詳情

The Client hereby declares that the information given above is true and correct.

客戶謹此聲明以上所提供的資料均屬真實及正確。

Client Signature

客戶簽署 : _____

Date

日期 : _____

For office use only 只供內部使用

Received by Mont Avenir	Signature Verified by	Checked by Compliance	Approved by R.O.	Inputted by	Approval by
Name	Name	Name	Name	Name	Name
Date	Date	Date	Date	Date	Date

Version 202407

Unit 2013, 20/F, The Center, 99 Queen's Road Central, Central, Hong Kong
香港中環皇后大道中99號中環中心二十樓2013室

Tel 電話: (852) 3105 1653

Fax 傳真: (852) 3105 9797

Email 電郵: cs@montavenir.hk