

# Joint Account Supplementary Form

Please complete ALL SECTIONS in full using BLOCK CAPITALS. Failure to do so could delay the opening of your trading account. Please call us directly at 0800 032 1948 (UK only) or +44 (0) 20 7429 7900 (free-phone) should you have any questions.

## 1 - Your Personal Details

Title Mr  Mrs  Miss  Ms  Dr

Other  Please specify

First Name

Surname

Date of Birth (DDMMYYYY)

Citizenship

Please enter all the countries where you are a resident for tax purposes and provide your tax identification number or equivalent such as social security number, national insurance number, resident registration number, or personal identification code. If your country does not issue tax identification numbers, please enter NA.

Country / Jurisdiction of tax residence	Tax Identification Number
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>

Name of Joint Applicant

### Your Current Address Details

Address Line 1

Address Line 2

Address Line 3

Town

County

Postcod

Country

Occupancy  
 Owner  Rented  Living with Parents

Time at current address Years  Months

If you have been at the above address less than 3 years, please give your previous address.

## Previous Address

Address Line 1

Address Line 2

Address Line 3

Town

County

Postcode

Country

Time at previous address Years  Months

## 2 - Contact Details

Preferred contact number (please tick appropriate box)

Home Tel No

Business Tel No

Mobile No

Email Address

## 3 - Employment Details

As an FCA regulated firm we are required to assess whether leveraged trading is appropriate for you. **Your responses will be used to determine whether we are able to open an account for you** so please complete your application carefully.

Employment Status Employed  Self employed

Retired  Student  Not Working

Employer / Business Name

*We will not contact your employer*

Nature of Business

## 4 - Financial Information

Your responses will be used to determine whether we are able to open an account for you. Please ensure that you provide accurate responses to the following important questions.

Total annual income

Total savings and investments

Source of funds

Savings/Investment  Family Income  Benefits

Loans/Credits  Property Income  Pension

Other

## 5 - Trading Experience

Understanding your trading knowledge and experience will assist us in determining if an account is appropriate for you. Please answer the following questions carefully.

How often have you traded the following products in the last 12 months?

**Shares or bonds**

Frequently  Regularly  Occasionally  Never

**Futures, options or ETFs**

Frequently  Regularly  Occasionally  Never

**CFDs or margined FX**

Frequently  Regularly  Occasionally  Never

How many times have you traded CFDs **or** spot FX in the last 12 months? (check one)

50 or more  25 - 49  10 - 24  Less than 10

Do you have work experience that provides you with a good understanding of trading CFDs?

Yes  No

If yes, please specify:

I have at least 3 years' work experience

I have at less than 3 years' work experience or at least one years' experience investing on my own behalf

Investing experience must be independent of your experience provided above.

Do you have any qualifications that assist your understanding of CFDs?

Yes  No

If yes, please specify:

I hold a professional qualification or degree such as the CFA, MBA, BSc or MA

I hold a qualification or degree in finance, economics, accounting OR a similar field.

## 6 - Additional Information

If you do not understand the following concepts a leverage trading account may not be appropriate for you.

I understand that CFDs are leveraged products and their performance may be volatile.

I understand  I don't understand

I understand that it is my responsibility to monitor and manage my account.

I understand  I don't understand

I understand that when trading leveraged products that my capital is at risk.

I understand  I don't understand

## 7 - Contact Preferences

Please keep me informed about news, products and services applicable to my account via:

Email  Phone  Post  SMS

You can change your preferences at any time within 'MyAccount', or [contact us](#).

## 8 - Declaration

I confirm:

- The information provided in this application is true and accurate.
- I have read and agree to the [Terms and Policies](#) including without limitation the [Customer Agreement](#) and [Privacy Policy](#).

- You may provide information to me (including without limitation any [Terms and Policies](#) and any changes to them) by email, on your website or by any other electronic means.
- I understand the nature and risks of Trading Spot Forex/CFDs and have read and understand the Risks Warning Notice in your [Terms and Policies](#).

If there is anything you do not understand, please call Client Management on 0800 032 1948 (UK only), directly at +44 (0) 20 7429 7900.

#### Data Protection

To comply with anti-money laundering regulations, the Company is required to collect information about you and to undertake checks on your identity and residential address, including accessing and using information held in any database or other electronic format. The Company may request further supporting documents from you to confirm these details. Such requests could delay the processing of this application.

The Company may use your personal information, for example, for responding to credit reference enquiries, searching the electoral register and making enquiries of credit reference and other agencies, who may retain a record of the enquiry and information given to them and who may also use your information in the future to assist other organisations for crime prevention and credit purposes.

For further details about how the Company will use your personal information, please see our Privacy Policy which is available on our website.

By signing this form you represent that all the information contained herein is true and accurate and you agree to be bound by the terms of this application form and the Agreement.

Some of the market data that you will be able to view as part of your account may include data from various exchanges. In compliance with their data usage requirements, you are required to confirm if you are a professional client. A professional client is a person who is not an individual, is not trading on its own behalf and is not registered with any regulatory body.

Exchange professional client  Exchange non-professional client

Is the country specified above in Your Current Address Details your only country of residence for tax purposes?

Yes  No

Please check the rules of any country in which you may possibly be a tax resident and/or seek further independent tax advice if you are unsure as to your tax status.

#### 9 - Signature

Signature

Date (DDMMYYYY)

--	--	--	--	--	--	--	--

#### What to do next

Please check the details that you have provided are correct and that the application form is signed. Then send your completed application to us by post or email scanned copies using the details below.

#### Post

FOREX.com  
Devon House  
58 St Katharine's Way  
London  
E1W 1JP  
Email: [newaccounts@forex.com](mailto:newaccounts@forex.com)