

Institutional Account Opening Form



Application Checklist

Individual:

Proof of Address
(Utility Bill, Tenancy Agreement, etc.)

Means of Identification
(Driver's License, International
Passport or National ID card)

Recent Passport Photograph
(Not more than 6 months old)

Corporation:

Certified True Copy of Board Resolution
Authorizing opening of ARM account
and designating the persons authorized
to sign on behalf of the Company

Certified true copy of the
certificate of incorporation

Certified True Copy of
Form CAC 7
(particulars of Directors of company)

Certified True Copy of
Form CAC 2

Certified True Copy of Memorandum
& Articles of Association

Please note that the service will commence only after ARM receives the signed account opening document and all relevant supporting documents.

Account Type

Please open the following account(s) (tick all that apply):

Please complete this form
digitally and upload the required
documents. For assistance, contact
your Relationship Manager.

Investment Management

Securities

Scheme Account

Trusteeship Services

All of the above (Consolidated HoldCo Account)

No of Employees

Discretionary

Non-Discretionary

Currency

Pls specify currency

Naira

USD

Corporate/Institutional Account Details (if selected)

*Registered Company/Institution Name

*RC Number

*TIN/VAT

*Registered Address

Type of Utility Bill

Issue Date

Expiry Date

Country of Incorporation

Nature of Business

Sector/Industry

Operating Address (if different)

Website

*Date of Incorporation



Contact Details (Primary Contact Person)

Name

Position

Email

Phone

Address

Your bank details

*Account Name

*Bank Name

*Account number

Dividends/ Redemption payment will only be made to the bank account details stated above.

Investment Profile

Risk Tolerance

Conservative

Moderate

Aggressive

*Source of Funds

Salary

Dividend

Gift

Others

Pls state if others

Authorised Signatories

Signatory A

*Name

*Gender

Male

Female

*Designation

*Phone

*Type of ID

*ID Number

*ID Card Issue Date

*ID Card Expiry Date

*Type of Utility Bill

*Issue Date

*Expiry Date

*N.I.N.

*B.V.N.

*Address

*Date of Birth

Signatory B

*Name

*Gender

Male

Female

*Designation

*Phone

*Type of ID

*ID Number

*ID Card Issue Date

*ID Card Expiry Date

*Type of Utility Bill

*Issue Date

*Expiry Date

*N.I.N.

*B.V.N.

*Address

*Date of Birth

*Mandatory field



Mandate section for signatory combinations

Mandate Instruction: Either to sign Both to sign Other (specify): Pls state if others

Other (specify): Pls state if others

Signature A

Date

/ /

Signature B

Date

/ /

Client Declaration & Authorization

By clicking below, I/We confirm that:

<input type="checkbox"/>	I/We confirm that the information provided is true and complete.	<input type="checkbox"/>	I/We agree that account statements may be sent—at my risk—to the correspondence address or email I have provided.
<input type="checkbox"/>	I/We agree to the terms and conditions of ARM and its subsidiaries.	<input type="checkbox"/>	I/We declare that the information provided above is true, complete, and accurate.
<input type="checkbox"/>	I/We understand that, as with all investments in securities, bonds, mutual funds, or trustee-managed products, the value of my investment(s) may fluctuate and is not guaranteed. I acknowledge that past performance is not indicative of future performance.	<input type="checkbox"/>	I/We consent to data sharing within ARM for service optimization.

Politically Exposed Person (PEP) Declaration

A Politically Exposed Person (PEP) is anyone who holds or has held a senior public position, such as a government official, senior military officer, judge, politician, or executive of a state-owned company.

For this declaration:

- Immediate family members include a spouse, children, parents, siblings, or close relatives by blood or marriage.
- Close associates are individuals with a close personal or business relationship with a PEP, such as business partners, those involved in major financial dealings, or those benefiting from transactions made by or for the PEP.

Signatory A

Are you, a member of your immediate family, or any of your close associates currently or formerly a Politically Exposed Person (PEP)?

Yes No If yes, please provide details below:

The PEP declaration is required by Law.

*Name

*Relationship with PEP

*Position of the PEP

*Mandatory field

Signatory B

Are you, a member of your immediate family, or any of your close associates currently or formerly a Politically Exposed Person (PEP)?

Yes No

The PEP declaration is required by Law.

*Name

*Relationship with PEP

*Position of the PEP

Signature Mandate

By signing below, I or we authorize and mandate all instructions related to this account to be executed in accordance with the signature(s) provided.

Name A

Name B

Signature A

Date / /

Signature B

Date / /

Indemnity for Electronic Based Redemption Requests/Instructions

I am an investor with ARM and hereby authorise ARM and/or its appointed Fund Managers, Securities Agents, or Trustees to honour redemption requests and instructions sent via electronic media in respect of my investment or trust holdings. I confirm the email address provided below as my designated email for this purpose.

Name

Name

Signature A

Date / /

Signature B

Date / /

Terms & Conditions

I agree to the terms and condition

YES

NO

[VISIT ARM.COM.NG/PRIVACY-NOTICE](https://www.arm.com.ng/PRIVACY-NOTICE) TO READ TERMS & CONDITIONS

Important Notice: Kindly be advised that SEC regulations require that we return remitted funds back to the originating account if account opening documentation is not completed within two weeks of receipt of funds by ARM.

*Name

*Name

*Signature A

Date / /

*Signature B

Date / /

ARM Data Privacy Notice

In line with the Nigeria Data Protection Act 2023 (NDPA), ARM is committed to protecting your personal data and ensuring your privacy rights are respected.

We collect and use your data to:

- Comply with legal and regulatory requirements
- Respond to your enquiries and deliver agreed services
- Improve our products, services, and customer experience
- Communicate updates, offers, or research via email, phone, or mail

- Maintain and manage our digital platforms
- Reach you if contact details change

By interacting with us, you consent to the collection, processing, and secure storage of your data. We collect only what is necessary, do not sell your information, and use it only as described in our privacy policy.

For details, visit: www.arm.com.ng