

Client fit and propper

for MOMENTUM MARKETS use only

MOMENTUM
MARKETS



Client					
Date:		Name:			
Adress / zip / city					
Name of company:		CVR no:		Position:	
Telephone no:		Mail:			

Profile					
investment purposes:					
Horizon of investment:	Year?	Risk tolerance:	High, medium or low		
Would you be able to withstand your portfolio decreased by 20% in a period:					
Pension funds start deposits:	Amount ?	Free funds start deposits:	Amount?		

Financial situation		
Taxable income / result before tax last two fiscal year:	Insert revenue, approx numbers	Insert revenue
Assets the last two years, including liquid assets, investments and real estate::	Insert information of total assets	
	Insert information on liquid assets	
	Insert information on illiquid investments	
	Insert information about real estate	
Financial liabilities the last two years::		
Equity past two years:		

Experience and knowledge	
Types of services that the client is familiar with	Knowledge of investment advice - high, medium or low
	Knowledge of the portfolio management - high, medium or low
Types of transactions for which the client is familiar	Knowledge of the purchase and sale of shares - high, medium or low
	Knowledge of hedging risk - high, medium or low
Types of financial instruments to which the client is familiar	Knowledge of shares - high, medium or low
	Knowledge of derivative financial instruments based on shares
The nature and number of clients transactions in shares the past two years	Client's purchase and sale of shares - number
	Insert the client's purchase and sale of derivative financial instruments based on shares - number

Education
Insert level of education:

Current or former employment
Insert nature of employment:

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Client signature

Momentum Markets

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