

## SCHEDULE – CLIENT DETAILS

A form has been submitted on March 20, 2014, via: <http://www.courtneydocs.co.za/> [IP 120.85.129.55]

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### Personal details

Title Mr

Surname Neilson

First Names Lloyd Peter

Preferred name Lloyd

Marital status Divorced

Nationality South African

Source document ID - Identity document

Date of birth dd/mm/yyyy 11/10/1963

ID/Passport nr 6310115295088

Income tax nr 0619236144

### Contact details

Country of residence South Africa

Physical address 3rd Floor, 220 Loop Street

City/Town Cape Town

Area code 8000

Postal address PO Box 611

City/Town Seapoint, Cape town

Postal code 8060

### Contact numbers

Home tel.nr 0215442442

Office tel.nr 0214220903

Mobile tel.nr 0726222184

Fax number 0214220906

Email address lloyd.neilson@iplworldwide.com

Additional  
email lloydn@globalrealsource.com

### Employment details

I am Employed

Occupation Director

Employer's  
name Global Real source

Employer's  
address 3rd Floor, 220 Loop Street

City/Town Cape Town

Area code 8000

Period with  
employer 14 Years

Nedbank  
Employee? No

### Bank details

Bank name TBA changing banks to FNB

Branch name TBA changing banks to FNB

Branch code TBA changing banks to FNB

Account  
name TBA changing banks to FNB

Account type Credit

Account  
number TBA changing banks to FNB

## Financial information

Previously  
sequestered?

No

If Yes, please  
explain briefly

N/A

Date  
rehabilitated

N/A

Gross  
monthly  
income

R0 to 50,000 pm

Net asset  
value

R1 million to R5 million

Amount you  
want to  
invest/trade

R50k

Source of  
funds

Savings

Income type

Salary

Are you a  
director of a  
JSE listed

No

company?

## Your interests

Which  
accounts are  
you interested  
in?  
[definitions  
below, and  
don't worry,  
you can  
change your  
selection later  
on]

Who makes  
the trading  
decisions?

I want to appoint a Portfolio Manager

How do you  
want to place  
your trades?

Telephone

Which one  
best  
describes  
you?

Long term investor

Is there  
anything else  
you want to

I would like to use Nico Coetzee as my portfolio manager.

tell us?

Prove that you're human

Enter text

w9gxr

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CLIENT DECLARATION

I/We warrant that the information contained herein is **true and correct** and that where this application is signed in a Representative capacity I/We have the necessary authority to do so and that this transaction is within my/our power. I/We understand that this application read with the annexure constitutes the entire agreement between the financial services provider and myself/ourselves. I/We understand the Terms and Conditions as above, and that I/We have received the disclosure information and prospectuses where applicable.

Signed at ..... on this date ..... 2014.

          ..... Signed by the <b>client</b> , duly authorised	          ..... Witness for the client
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