



ACCOUNT PARTICULARS AMENDMENT FORM

綜合戶口資料更改表格

ACCOUNT INFORMATION 帳戶資料			
Account No. 帳戶號碼		Account Name 帳戶名稱	
CHANGE OF CLIENT DETAILS 更改客戶資料			
☐ Bank information 銀行戶口資料 <i>*Please provide the bank proof 請提供銀行證明</i>	Bank name : 銀行名稱		
	Bank account no.: 銀行戶口號碼		
☐ Address 地址 <i>*Please provide the address proof within 3 months 請提供三個月內有關之地址證明</i>	☐ Residential Address 住宅地址 ☐ Correspondence Address 通訊地址 ☐ Office Address 辦公室地址		
	Address : 地址		
☐ Contact No. 聯絡電話	☐ Home Phone No. 住宅電話		☐ Mobile Phone No. 流動電話
	☐ Office No. 辦公室電話		☐ Fax No. 傳真號碼
☐ E-mail Address 電郵			
☐ Employment Status 職業狀況	Name of Employer 僱主名稱		
	Business / Industry 業務/行業	Job Title 職位	Duration with Employer 受僱年期
☐ Financial Situation 財政狀況	Liquid Asset 流動資產 ☐ ≤HKD100,000 ☐ HKD100,000 – HKD500,000 ☐ HKD500,000 - HKD1,000,000 ☐ HKD1,000,000 - HKD5,000,000 ☐ HKD5,000,001 - HKD10,000,000 ☐ ≥HKD10,000,001		
	Net Worth 資產淨值 ☐ ≤HKD100,000 ☐ HKD100,000 – HKD500,000 ☐ HKD500,000 - HKD1,000,000 ☐ HKD1,000,000 - HKD5,000,000 ☐ HKD5,000,001 - HKD10,000,000 ☐ ≥HKD10,000,001		
	Annual Income 每年收入 ☐ ≤HKD100,000 ☐ HKD100,000 – HKD500,000 ☐ HKD500,000 - HKD1,000,000 ☐ HKD1,000,000 - HKD5,000,000 ☐ HKD5,000,001 - HKD10,000,000 ☐ ≥HKD10,000,001		
	Ownership of Residence 住屋業權 ☐ Owned 擁有 ☐ Mortgaged 已抵押 ☐ Not Mortgaged 沒有抵押 ☐ Not Owned 沒有 ☐ Rented 租用物業 ☐ Living with Family 與家人同住 ☐ Company Quarters 公司宿舍		
☐ Others amendment 其他更改			

CHANGE OF CLIENT SERVICES INSTRUCTION 更改客戶服務指示			
☐ Internet Trading Password Re-set 重新設定網上交易系統密碼	☐ Reset Password 重設密碼		
☐ Method of Statement Collection 收取結單指示	☐ by E-mail 以電郵方式收取	☐ by Mail 以郵寄方式收取 (Monthly charge \$20 每月收取\$20 手續費) ☐ Residential Address - 住宅地址 ☐ Business/Office Address - 辦公室地址 ☐ Correspondence Address - 通訊地址	
☐ Subscription / Cancellation of Account Services 新增／取消帳戶之服務	☐ Cancellation of Third Party Authorization 取消第三者操作帳戶授權		
	☐ Termination / Subscription of Internet Trading Service 取消／新增網上證券交易之服務		
Client Signature(s) 客戶簽署 S.V.		AE Signature 經紀簽署	
Company chop if applicable (公司蓋章, 如適用)		AE Code & Name 經紀號碼及姓名	

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