



UITF Documentary Requirements (Individual Clients)

To open a UITF account, fill-out, print, sign, and submit the following forms to your nearest LANDBANK Branch or at the Trust Business Development Department 31/F LANDBANK Plaza Malate, Manila.

UITF Account Opening Forms

- Client Suitability Assessment (CSA) Form
- UITF Selection and Acknowledgement of CSA Result
- Acknowledgement & Signing Portion (Investor's Acknowledgement)
 - CSA
 - Reclassification of Risk Profile and Waiver of CSA (if applicable)
 - Risk Disclosure Statement
 - UITF Participating Trust Agreement
 - UITF Data Privacy Consent Form
 - Cooling-off Provision (client's discretion)

Know Your Client *(Forms to be provided by the Branch or TBG Personnel)*

- Client Information Sheet(CIS)
- Specimen Signature Card (SSC)
- Photocopy of a valid government issued I.D.

Optional

- LANDBANK UITF Auto Invest Program Enrolment Form (UITF Regular Subscription)
Allows UITF clients to automatically contribute to their existing UITF account by authorizing LANDBANK TBG to debit their nominated LANDBANK deposit account and purchase units on a regular basis. For as low as Php1,000.00 per quarter, enjoy hassle-free investing and reap the benefits of peso cost averaging.

The investment shall only be done upon submission of complete documentary requirements.

For inquiries, contact us @

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