**PERSONAL RETIREMENT TRUST ACCOUNT (PRTA)**

**Documentary Requirements**

Risk Profiling

[ ]  Client Suitability Assessment (CSA)

[ ]  Reclassification of Risk Profile (If applicable)

[ ]  Risk Disclosure Statement (RDS)

Know Your Client

[ ]  Client Information Sheet and Specimen Signature Card (CISSC)\*

[ ]  Specimen Signature Card (SSC)

[ ]  Photocopy of a government issued identification document

[ ]  2X2 ID Picture

[ ]  Birth Certificate or ID of Beneficiary

\* *Pursuant and in compliance with AMLA Section X806.2.a. and LANDBANK's policy on Know Your Client(KYC), all information in the Client Information and Specimen Signature Card (CISSC) should be completely filled-out*

PRTA Documents

[ ]  Investment Policy Statement (IPS)

[ ]  Trust Agreement

*The account shall only be opened upon submission of complete documentary requirements.*

**Contact Us**

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