

更改个人资料及客户经理表格
Change of Personal Particular & RM Form

户口名称 Account Name: _____

户口号码 Account Number: _____

更改个人资料 Change of Personal Particular

请由_____ (日期) 起将本人/吾等之个人资料更改如下:

Please change my/our personal particular effective from _____ (Date) as follows:

地址 Address: _____

家住电话 Home No.: _____

公司电话 Office No.: _____

手提电话 Mobile No.: _____

传真号码 Fax No.: _____

电邮地址 Email: _____

银行名称 Bank Name: _____

银行账户号码 Bank A/C No.: _____

结单语言 Statement Language: 中文(简体字) Chinese (simplified text) 英文 English

其它 Others: _____

申请/取消交易确认书服务 Subscription/Cancellation of Trade Confirmation Service

本人/吾等现申请交易确认书服务(只可选择其中一种)。
I/We hereby subscribe Trade Confirmation Service (can only choose either one of the choices).

传真收取, 传真号码:
Receive via Facsimile, Fax No.: _____

电邮收取, 电邮地址:
Receive via E-mail, E-mail _____

本人/吾等现取消 传真 或 电子邮件 交易确认书服务。
I/We hereby cancel my/our Facsimile or E-mail Trade Confirmation Service.

更改客户经理 Change of Relationship Manager

请将负责本人/吾等户口之客户经理更改如下:
Please change the Relationship Manager who is responsible for my/our captioned account as follows:

现任客户经理 Existing RM: _____ 客户经理编号 Sales Code: _____

新任客户经理 New RM: _____ 客户经理编号 Sales Code: _____

客户签署 Customer's Signature: _____ 日期 Date: _____

| For Official Use Only | | | | | | | | | |
|-----------------------|-----------------------|-----------------|------------------------|--------|-------------------|------------------|---------|----------|---------|
| Sales Admin | Approving Authorities | Confirmed by RM | | | | Commission Rate* | | | |
| | | Existing RM | Existing Referral Code | New RM | New Referral Code | HK Stock | | US Stock | |
| | | | | | | Online | Offline | Online | Offline |
| | | | | | | | | | |

* 由客户经理填写 To be completed by RM