

Data Capture - Company



Company Details

ID Number (if existing)	<input type="text"/>
Investor Type	Professional <input type="checkbox"/> Retail <input type="checkbox"/>
Company Name	<input type="text"/>
Registration Number	<input type="text"/>
Country of Incorporation	<input type="text"/>
Registered Charity Number	<input type="text"/>
Contact Full Name	<input type="text"/>
Contact Date of Birth	<input type="text"/>
Address	<input type="text"/>
Postcode	<input type="text"/>
Reporting Currency	<input type="text"/>
Advice Given In	<input type="text"/>

Bank Details

Account Name	<input type="text"/>
BIC/SWIFT Code	<input type="text"/>
IBAN	<input type="text"/>
Account Currency	<input type="text"/>

Director Details (Individual)

Title	<input type="text"/>		
Full Name	<input type="text"/>		
Date of Birth	<input type="text"/>	Gender	<input type="text"/>
Nationality	<input type="text"/>		
Tax ID Number	<input type="text"/>		
Tax Residency	<input type="text"/>		

Residential Address	<input type="text"/>
Passport Number	<input type="text"/>
Postcode	<input type="text"/>
Country	<input type="text"/>
Telephone Number	<input type="text"/>
Email	<input type="text"/>

Director Details (Corporate)

Name	<input type="text"/>
Email	<input type="text"/>
Address	<input type="text"/>
Postcode	<input type="text"/>
Country	<input type="text"/>

Investment Details

Product Name	<input type="text"/>
Investment Amount (and Currency)	<input type="text"/>
Source of Wealth	<input type="text"/>

Adviser Details

Adviser Name	<input type="text"/>
Adviser Firm	<input type="text"/>

Adviser Charges

Initial	<input type="text"/>	%	or	Amount	<input type="text"/>
Ongoing	<input type="text"/>	%	or	Amount	<input type="text"/>

