



**UTT AMIS**  
Asset Management and Investor Services



Investment Solution Tailored to Your Needs

CLIENT DETAILS FORM



# UTT WEALTH MANAGEMENT

## CLIENT DETAILS FORM (Fomu ya Maelezo ya Mwekezaji)

|   |   |  |                               |
|---|---|--|-------------------------------|
| <b>Applicant's Category</b><br>(pls tick the relevant)<br>(Taarifa za mwombaji)<br>(Tafadhali husika) | <b>A. Resident Citizen of Tanzania</b><br>(Mtanzania mkazi) | <b>Non Resident Citizen of Tanzania</b><br>(Mtanzania asiye mkazi) | <b>Others</b><br>(Nyinginezo) |
|   | <b>B. Individual</b><br>(Binafsi)                           | <b>Male</b><br>(Mume)  | <b>Female</b><br>(Mke)        |

|  |                              |  |
|--|------------------------------|--|
| <b>Holding Basis (pls the relevant)</b><br>(Jinsi ya umiliki, tafadhali ainisha sehemu husika) | <b>Singly</b><br>(Mtu mmoja) | <b>Jointly (pls furnish details at SN. 22-33)</b><br>(Wamiliki wawili) |
|--|------------------------------|--|

|   |                                 |                                |                                     |                                     |                              |
|---|---------------------------------|--------------------------------|-------------------------------------|-------------------------------------|------------------------------|
| <b>Occupation (pls the relevant)</b><br>(Kazi ya mwombaji, tafadhali ainisha sehemu husika) | <b>Agriculture</b><br>(Mkulima) | <b>Employed</b><br>(mwajiriwa) | <b>Self Employed</b><br>(Amejajiri) | <b>Business</b><br>(Mfanyabiashara) | <b>Others</b><br>(Mengineyo) |
|---|---------------------------------|--------------------------------|-------------------------------------|-------------------------------------|------------------------------|

| SN | Applicant's Details<br>(Taarifa za mwombaji)  | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 |
|----|---|---|---|---|---|---|---|---|---|---|----|----|
| 1  | <b>Surname (for individuals) – 1st Applicant/ Minor</b><br>(Jina la ukoo la mwombaji wa kwanza)   |   |   |   |   |   |   |   |   |   |    |    |
| 2  | <b>First name (for individuals) – 1st Applicant /Minor</b><br>(Jina la kwanza la mwombaji wa kwanza)  |   |   |   |   |   |   |   |   |   |    |    |
| 3  | <b>Middle name (for individuals) – 1st Applicant/Minor</b><br>(Jina la katikati la mwombaji wa kwanza)  |   |   |   |   |   |   |   |   |   |    |    |
| 4  | <b>Date of Birth of the Minor / 1st Applicant (DD-MM-YYYY)</b><br>(Tarehe ya kuzaliwa ya mwombaji wa kwanza)  |   |   |   |   |   |   |   |   |   |    |    |
| 5  | <b>Surname of parent/guardian/sponsor (in case of a minor)</b><br>(Jina la ukoo la mzazi/mlezi/mfadhili) kama mwombaji ni chini ya miaka 18   |   |   |   |   |   |   |   |   |   |    |    |
| 6  | <b>First Name of parent/guardian/sponsor (in case of a minor)</b><br>(Jina la kwanza la mzazi/mlezi/mfadhili) kama mwombaji ni chini ya miaka 18)   |   |   |   |   |   |   |   |   |   |    |    |
| 7  | <b>Middle Name of parent/guardian/sponsor (in case of a minor)</b><br>(Jina la katikati la mzazi/mlezi/mfadhili) kama mwombaji ni chini ya miaka 18)  |   |   |   |   |   |   |   |   |   |    |    |
| 8  | <b>For Corporate applicants (Name in full of the Body Corporate/Local Govt. Authority/Pension or Society Fund/Cooperative Society / Charitable or religious rust etc.)</b> (Jina kamili la taasisi) |   |   |   |   |   |   |   |   |   |    |    |
| 9  | <b>P.O. Box No.</b> (Sanduku la Posta)  |   |   |   |   |   |   |   |   |   |    |    |
|    | <b>Town (Post Office Location)</b> (Mji)  |   |   |   |   |   |   |   |   |   |    |    |
|    | <b>District</b> (Wilaya)  |   |   |   |   |   |   |   |   |   |    |    |
|    | <b>Region</b> (Mkoa)  |   |   |   |   |   |   |   |   |   |    |    |
| 10 | <b>Telephone number (if available)</b> (Namba ya simu, kama ipo)  |   |   |   |   |   |   |   |   |   |    |    |
| 11 | <b>E-mail address (if available)</b> (Barua pepe, kama ipo)   |   |   |   |   |   |   |   |   |   |    |    |

**1st APPLICANT IDENTIFICATION DETAILS (Pls furnish whichever is applicable/available. However it is mandatory to furnish at least one identification Number)**

**(TAARIFA ZA UTAMBULISHO ZA MWOMBAJI WA KWANZA - Ni muhimu kujaza angalau namba mojawapo ya utambulisho)**

|    |   |  |  |  |  |  |  |  |  |  |  |  |
|----|---|--|--|--|--|--|--|--|--|--|--|--|
| 12 | Election Card Number (Namba ya utambulisho wa mpiga kura)           |  |  |  |  |  |  |  |  |  |  |  |
| 13 | Passport Number (Namba ya Pasipoti)                                 |  |  |  |  |  |  |  |  |  |  |  |
| 14 | Registration Number (for Corporate) (Namba ya usajili, Kwa taasisi) |  |  |  |  |  |  |  |  |  |  |  |
| 15 | Driving Licence Number (Namba ya Hati ya kuendesha gari)            |  |  |  |  |  |  |  |  |  |  |  |
| 16 | Vehicle Registration Number (Namba ya usajili wa gari)              |  |  |  |  |  |  |  |  |  |  |  |
| 17 | Employer ID Number (Namba ya kitambulisho cha Mwajiri)              |  |  |  |  |  |  |  |  |  |  |  |
| 18 | Pension fund ID Number (Namba ya Kitambulisho cha Pensheni)         |  |  |  |  |  |  |  |  |  |  |  |
| 19 | Tax Identification Number (TIN) (Namba ya kadi ya mlipa kodi)       |  |  |  |  |  |  |  |  |  |  |  |

### INVESTMENT DETAILS

|    |  |                           |  |
|----|--|---------------------------|--|
| 20 | Indication of investment option (please the relevant box)<br>(Aina ya uwekezaji) | Income option<br>(Malipo) | Re-investment option<br>(Kuongeza vipande) |
|----|--|---------------------------|--|

.....(form continued on the reverse)



**DETAILS OF FOREIGN ADDRESS (to be furnished by Non Resident applicant's  
(ANUANI YA NJE – Taarifa zijazwe na mwombaji Mtanzania ambaye si mkazi)**

|    |   |  |
|----|---|--|
| 42 | House/Office/Building/Street Number or Name<br>Namba au jina la nyumba/Ofisi/Jengo/Mtaa |  |
|    | Town / City / State Name – Jina la mji / Jiji / Jimbo                                   |  |
|    | Country Name – Nchi ya makazi   |  |
|    | Postal Code Number (if any) – Namba ya posta (kama ipo)                                 |  |

**SIGNATURE OF APPLICANT/S - SAHIHI YA MWOMBAJI**

|   |   |  |
|---|---|--|
| 43  | Name of the 1 <sup>st</sup> Auth. Signatory<br>Jina la mweka sahihi wa kwanza | Sahihi /alama ya dole gumba ya mweka sahihi<br>wa kwanza |
|   | Designation<br>(Kazi/shughuli)  |  |
| 44  | Name of the 2 <sup>nd</sup> Auth. Signatory<br>Jina la mweka sahihi ya pili   | Sahihi /alama ya dole gumba ya mweka<br>sahihi wa pili   |
|   | Designation<br>(Kazi/shughuli)  |  |
| <b>(For Corporate applicants, put the official stamp and signature in lieu of Declaration that the application has been sanctioned according to the organization's constitutions etc)</b><br>(Kwa mwombaji ambao ni taasisi/ makampuni / mashirika/ weka/ piga muhuri wa ofisi kuashiria katiba ya chama imeridhia) |   |  |

45 | Date (DD-MM-YYYY)Tarehe

|  |  |  |  |  |  |  |  |  |  |
|--|--|--|--|--|--|--|--|--|--|
|  |  |  |  |  |  |  |  |  |  |
|--|--|--|--|--|--|--|--|--|--|

**To be filled if application is signed by thumb impression – Ijazwe na mwombaji aliyeweka dola gumba**

|    |   |   |
|----|---|---|
| 46 | Name of Witness<br>(Jina la shahidi)      | Signature of Witness<br>(Sahihi ya shahidi) |
|    | Address of Witness<br>(Anuani ya shahidi) |   |

**Notes**

- If the form is incomplete and any other requirement is not fulfilled, the form is liable to be rejected.**
- All communication relating to issue of Statement of Account, change in nomination, name address, bank details and death claims etc., may please be addressed to Registrar at the following address.**

**Notisi**

- Maombi ya huduma hii yatakataliwa endapo fomu ya maombi haitajazwa kikamilifu kama ilivyoanishwa katika kiambatanishi kilichopo katika fomu ya maombi.
- Mawasiliano yote kuhusu mauzo na manunuzi ya upande,taarifa ya akaunti kubadili jina la mrithi kubadili jina, anuani, taarifa za benki, madai ya kifo n.k yawasilishwe kwa msajili kupitia anuani yafuatayo:-

**UTT AMIS PLC**

**Sukari House, 2<sup>nd</sup> Floor Sokoine/Ohio Street, P.O. Box 14825, Dar es Salaam – Tanzania**

**Tel:** +255 22 2128460, **Toll free Number:** +255 754 800 544/ +255 800 455 (Voda), +255 715 800 544/+255 715 800 455 (Tigo), +255 782 800 455 (Airtel); **Fax No:** +255 22 2137593. **Email:** uwekezaji@utt-tz.org; **Website:** www.utt-tz.org





