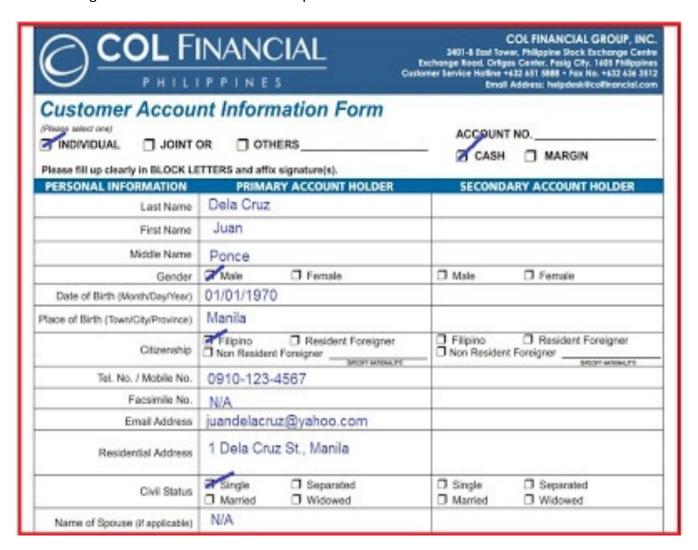
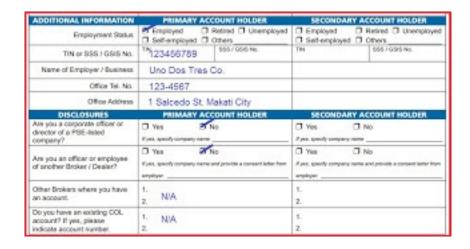
HOW TO PROPERLY FILLOUT COL FORMS

Let's start with an **Individual Account**. Tick off the 1st box (Individual). Most important thing to remember if it's an individual application is that you need NOT fill out the 'Secondary Account Holder' portion.

Look at the images first and then read the descriptions that follow.

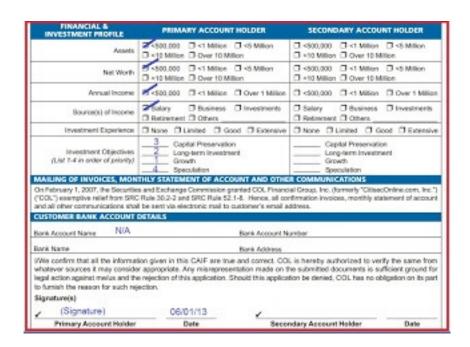


The first part is the 'Personal Information'. This is pretty basic. It just asks for your personal details like name, address, contact numbers, etc. Make sure you put your correct Email address. COL Financial is an online brokerage, and hence, most of its correspondence will be via email. (Always check your Spam folder as well for COL's initial email and add this email address to your Contacts).



The 2nd part is 'Additional Information' and it asks about your employment details. If you are unemployed, just tick off that box and write N/A (Not Applicable) on the other boxes. Otherwise, answer all guestions.

The 3rd part is 'Disclosures'. Again, pretty simple. Just answer either yes or no. If any part here doesn't apply to you, just write N/A.



The 4th part is 'Financial and Investment Profile'. Just for compliance sake, let's tick off our choices here.

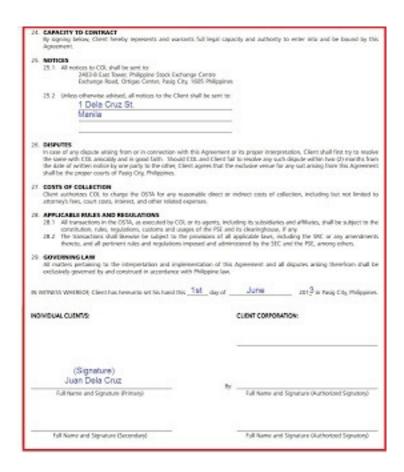
For the 'Investment Objectives', all you need is to number them according to your priority.

- a. 'Capital Preservation', for lack of better explanation, is if you want to preserve your capital. You are very conservative in your approach to investing in that you want a guaranteed rate of return or at least just a return of what you originally invested.
- b. 'Long-term Investment' is if you are ok to invest funds you won't be needing for at least 5 years or more.
 - c. 'Growth' is if you want your investments to grow at a rate faster than what regular banks give.

d. **'Speculation'** is if you have a very aggressive approach to investing. You are willing to take on higher risks just to have a higher rate of investment return.

For **Bank Information**, it is really up to you to fill this part out, but it is NOT mandatory that you have a bank account before you can open a COL account. If you don't have one (or you just don't want to divulge the info), you may just write N/A.

On the signature part, just sign on the first line (Primary Account Holder).

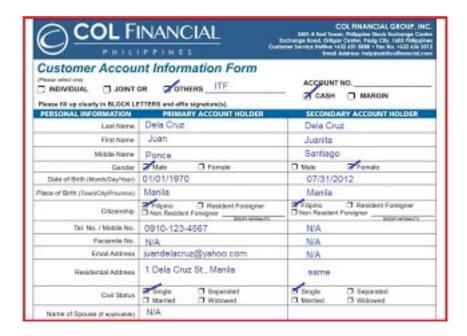


Last is the signature part on page 4 of Online Securities Trading Agreement. Please write your address on #25.2. Write the date when you signed the document. Write your name and sign on the first signature line (Primary).

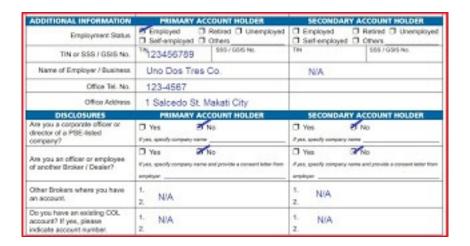
We also have 2 signature cards to sign, same as what banks usually require us when we open an account with them.

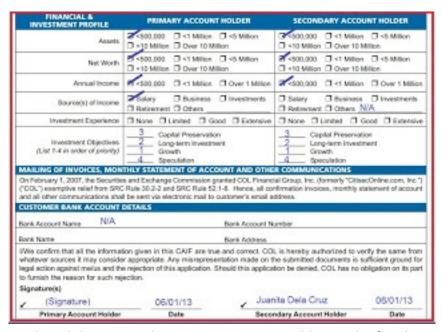
For **Joint Accounts**, it is basically the same procedure, except that you need to write down the details of the other party on the 'Secondary Account Holder' portion. Secondary Account Holders may be your spouse, parent, sibling, adult child, a friend, any relative or anyone for that matter.

For **Minors** (below 18 yrs), parents may open an ITF Account for them. This is how to fill out the app.

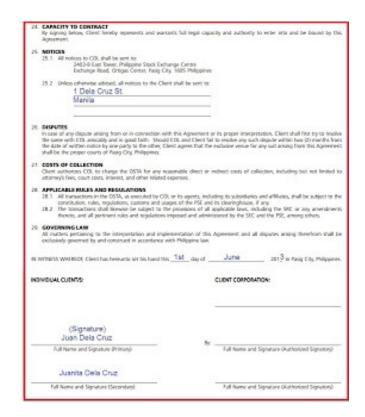


Instead of ticking off 'Individual', tick off 'Others' and write ITF. On the 'Secondary Account Holder' portion, write the details of the child.





On the signature portion, the adult signs as the Primary Account Holder on the first line, and writes the name of the child on the second line. Be sure to put on the date when you accomplished the forms.



Same thing here and on the signature cards. The adult writes his name and signs on the first line, and writes the name of the child on the second line.

In addition, the Primary Account Holder must print and sign the <u>Supplementary Form for ITF Accounts</u>, and attach it to the app before submitting.

There you have it. Now, that you've filled out the forms, just attach a copy of your ID (please sign on the copy 3x) and a billing statement (credit card, electric, water, mobile, phone, bank statement, etc.).

Once everything is ready, either you submit personally to COL or have it picked up (within Metro Manila only). Call COL's hotline at 651-5888.

For TrulyRichClub members, we do have a point person in COL to whom you can scan/email the documents first before mailing just to make sure everything is ok to avoid delays.

Thanks & God bless,



If you have any related questions or want guidance please contact our **Concierge Director, Ms. Joey** via:

1. Call/Text: **0917-8990296**

2. Official FB Page: https://www.facebook.com/TheOfficialTrulyRichClub

3. Email: supportgold@boclubs.com

P.S. 1. COL Financial, Inc. is the recommended Stock Broker of Bro. Bo Sanchez to all his TRC Members.

P.S. 2. Wanna join us at the 'Happiest Place on Earth'? We do a meet and greet with Bro. Bo every Sunday at the Feast PICC. Please feel free to join us after the 3rd session. For Feast schedules in PICC and other areas around the metro, please refer to the right side of Kerygma Family homepage.