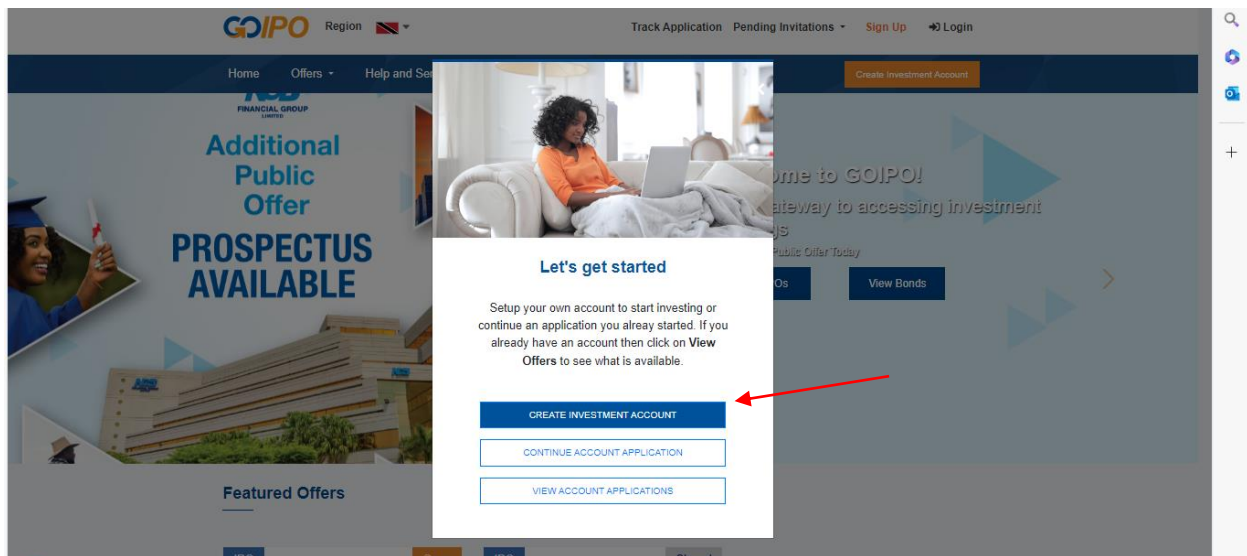
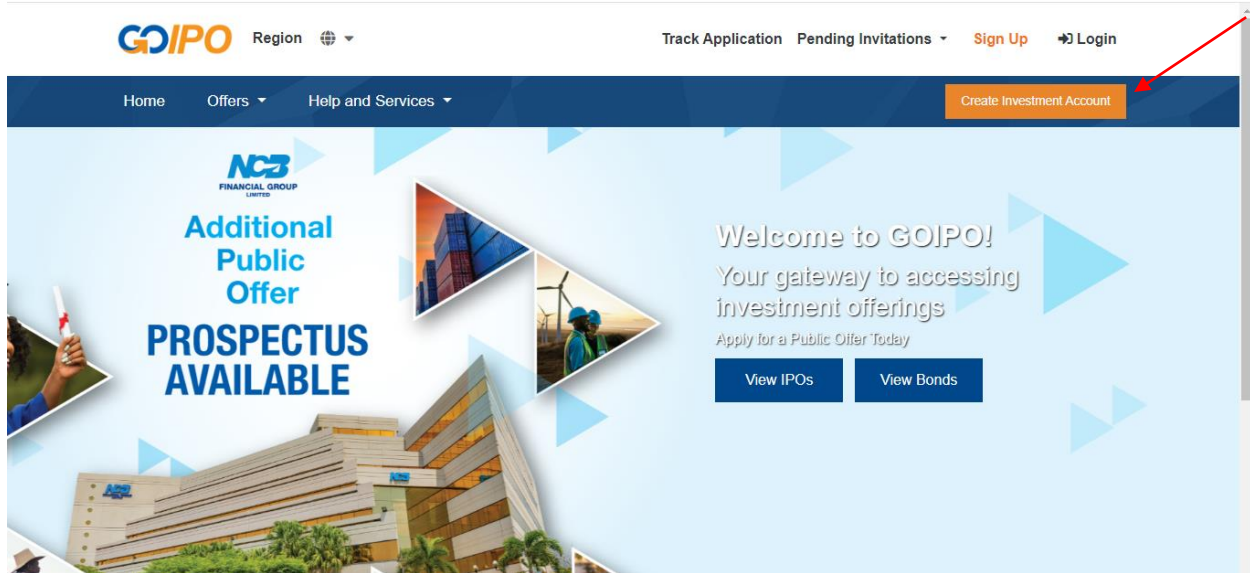


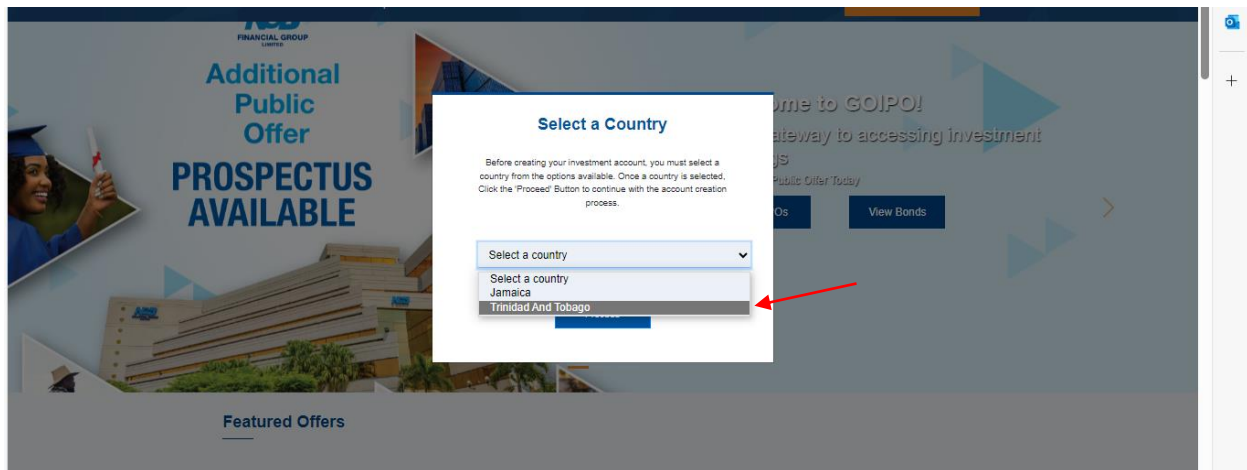
GOIPO ACCOUNT OPENING GUIDE

Step 1: proceed to <https://goipo.jncb.com/>

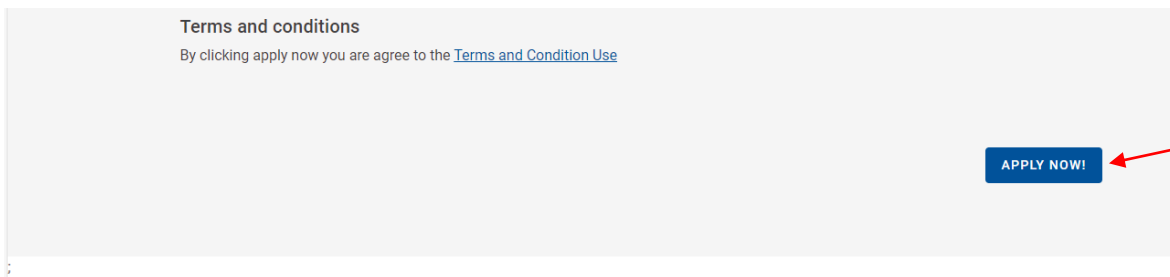
Step 2: click “Create an investment Account” for both tabs



Step 3: Select region as Trinidad and Tobago and click proceed



Step 4: Scroll Down and click apply now



Step 5: You will be prompted to enter an email address and enter the verification code that will be sent

Step 6: check all the relevant choice and click start application

A screenshot of a web application interface showing a form with three questions. At the top left, there is a blue header with a back arrow and the text "EXIT". At the top right, there is a blue header with the "IPO" logo. The main content area has a light blue background. The first question is "Do any of the following apply to you?". Below this are three questions, each with "Yes" and "No" radio button options. The "No" option is selected for all three questions. The questions are: "Are you a PEP?", "Are you the family member of a PEP?", and "Are you a close associate of a PEP?".

Are you a Trinidad and Tobago tax resident?


Yes
 No

Are you a Specified US Person for tax purposes?

Yes
 No

Are you a tax resident of any other country?

Yes
 No

[EXIT TO HOME PAGE](#) [START APPLICATION](#) 

Note : Politically exposed person (PEP)

Step 7: fill out all the required information and click next step

Application form Example

PERSONAL DETAILS

Tell us about yourself

Personal Information

Male	Mr.
John	Doe
Middle Name (optional)	Maiden Name (optional)
Alias (optional)	03/03/2000
Trinidad and Tobago	Trinidad and Tobago

Port of Spain	Single
OTHER	INTERN

Are you a citizen/permanent resident of any other country?
 Yes
 No

What branch location would you like to hold the account?

NEWTOWN CENTRE

PREVIOUS STEP NEXT STEP

How can we contact you?

Contact Information

8681234567	MarquezC@jncb.com
Home Phone (optional)	Work Phone (optional)

What is your preferred method of correspondence?
 Email
 Mail

What are your identification details?

Enter your national identification number (TIN, BIR Number, TRN)

123456789

Trinidad and Tobago

Do you have a Tax Exemption Letter?

Yes

No

PREVIOUS STEP

NEXT STEP

Tell us your address details

Current Home Address

#1 Apple Street

Address Line 2 (optional)

TRINIDAD AND TOBAGO

Port of Spain

State/Parish

00

20

NOTE : You can put zeros for postal code.

Current Mailing Address

Same as Current Home Address

Previous Home Address

Same as Current Home Address

PREVIOUS STEP

NEXT STEP

Tell us about your employment details

Current Employer

Full-Time



JohnDoe

Personal



86812334567

10



Nature of Business (optional)

Employer Address

#1 Apple Street

Address Line 2 (optional)

TRINIDAD AND TOBAGO



Port of Spain



State/Parish



00

Are you a Director or Affiliate?

Are you a controlling or significant shareholder of NCBMBTT?

Yes

No

Are you affiliated with or employed by a stock exchange or member firm of an exchange or a securities broker-dealer?

Yes

No

Are you a Director/Officer of NCB Merchant Bank (T & T) Limited?

Yes

No

Are you a relative (spouse, parent, sibling, child) of a Director/Officer of NCB Merchant Bank (T & T) Limited?

Yes

No

Are you a person who holds 10% or more of any class of shares of NCBMBTT?

Yes

No

How would you like to invest with us?

First state your annual income

Less than US\$6,500

What is the purpose of this investment account?

Investing

How much do you estimate to invest annually?

1,000.00

TTD

How will you fund your investments?

Income

Salary

Salary

10,000.00

PREVIOUS STEP

NEXT STEP

Note: net worth is in usd so you will need to divide by 6.8

Where would you like your dividends to be paid?

Bank Information

FCB



FCB LIMITED - MARAVAL



Account Information

123456

Shares Held in Portfolio (optional)

TTD



Savings



List the Full Names of all the persons on this account

John Doe

+ ADD NAME

Let's assess your risk level with 5 questions

1. My Primary Investment Objective is:

- Preserve my initial investment I cannot afford to lose
- Generate stable returns even if there is a chance that I will see a small loss on my investment
- Find a balance- I would like regular income but I would also like higher returns even if it means I could lose some of my investment
- Grow my initial investment by risking some of my money
- Generate the highest possible return on my investment by taking the necessary risk

PREVIOUS STEP

NEXT STEP

Let's assess your risk level with 5 questions

2. My knowledge on the financial market:

- None whatsoever
- Some basic knowledge such as difference between different assets
- Above basic knowledge, probably just about average. I know that I should diversify and I have monies in different assets such as stocks, bonds, repos
- Above average knowledge. I can look at financial statements and get an idea as to whether or not the stock is attractive
- Advanced knowledge. I know most financial products, I am aware of what drives risk, returns and performance

PREVIOUS STEP

NEXT STEP

Let's assess your risk level with 5 questions

3. About my current income:

- My portfolio will be my only source of income
- I have one stable income source (excluding income from my portfolio) but I have to dip into my investments to fund some of my monthly expenses
- I have one stable income that just about meets my monthly expenses
- I have at least one income source which covers my monthly expenses and allows me to save/invest regularly.
- I have multiple income sources (at least one is stable) that comfortably meet all my expenses and allow me to invest heavily.

PREVIOUS STEP

NEXT STEP

Let's assess your risk level with 5 questions

4. How long will I invest these funds:

- Less than 1 Year
- 1 to 2 Years
- 2 to 5 Years
- 6 to 10 Years
- More than 10 Years

PREVIOUS STEP

NEXT STEP

Let's assess your risk level with 5 questions



5. I am most comfortable with:

- All my funds in riskier assets such as stocks knowing that there is a possibility that I could lose most of my money
- All my money on a repo or other money market products because I don't like risky investments
- A larger portion of my portfolio invested in risky assets knowing that there is the possibility of losing some of my money
- A larger portion invested in money market products and just a small amount in risky assets
- Exactly half of my funds in money market products and half in risky assets

PREVIOUS STEP

NEXT STEP

Enter information presented on the uploaded ID.

National ID	012345678
John Doe	01/01/2020 
01/01/2030 	Trinidad and Tobago

How will your funds be managed?

Management Authority

- Investment Advisory
Client must be contacted before execution of any trade or transaction
- Execution only
Client does not require investment advice

Terms and Conditions

Please click each agreement link to review and accept

checkbox stating that "I have read and agree".

[Facsimile, Email, Verbal Agreement](#) ←

Kindly review the Top Agreement and confirm your agreement to the terms and conditions by selecting the checkbox stating that "I have read and agree".

[Top Agreement](#) ←

PREVIOUS STEP

NEXT STEP

Step 8: Download and complete all the attached forms and click the checkbox.

Step 9: A confirmation email will be sent once application is completed