



Blue Financial Services Gh Ltd.

Matti House, No. 817/1, No. 2, Eleventh Lane, Ringway Estates, Osu
Digital Address: GA-032-0507, 0303-968898 | 0303-968196
info@bluefs.com.gh, www.bluefs.com.gh

FIXED DEPOSIT APPLICATION FORM

Referred by: _____

SECTION A: Personal Information (Please complete all sections if you don't have an existing account with BFSGL)

Full Name: _____

Account Number: _____ Unit #: _____

SECTION B: Investment Information

Type of Fixed Deposit: Investment Box: Investment Plus: Premium Investment Plus:

Mode of Deposit: Cheque Bank EFT Cash Tenor in Days: 91 181 364 Effective Rate: _____

Start Date: Maturity Date: I/We authorize BFSGL to (tick as appropriate)

Roll over Principal plus interest Rollover principal only Do not rollover Invest Amt: _____ Amt in words: Mode of payment: Cheque Bank EFT Others: _____

Name of Bank _____ Account Number: _____

Bank Branch: _____ Branch Code: _____

Source of funds: Salary Personal Savings Commission Dividend Others, please specify: _____

Deposit Frequency: Weekly Monthly Quarterly Annually

BFSGL shall migrate your investment from Investment Box product to Investment Plus upon reaching a GHc 5,000 threshold for higher returns.

Kindly confirm. Yes No

SECTION C1: Other Personal particulars

Full Name: _____

Date of birth: Gender: Male Female Dependents:

GPS: Nationality:

Ghana Card #: Language Spoken:

Date Issued: Expiry Date: Marital Status:

P. O. Box: Single: Married: Divorced: Widow/er:

Disability: Yes No

Mobile #: Other Mobile #:

Email: _____ Hse no: _____ Years of Residence _____

Owns Relative Rent Others Town/Land Mark: _____

Home Town: _____ District: _____ Region: _____

SECTION C2: Employment

Employment Status: Permanent Contract Employment Start Date:

Education: JHS SHS Tertiary

Occupation:

Position/Rank: Work phone#:

Sector/Unit:

Work /Office Address

Monthly Income (GHS): <1,000 1001 – 5000 5001-10,000 >10,001

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Work phone#:

Sector/Unit:

Work /Office Address:

Monthly Income (GHS): <1,000 1001 – 5000 5001-10,000 >10,001

SECTION E: Next of Kin (Beneficiary)

Full Name:

Relation to Client:

Mobile #:

SECTION F: TERMS AND CONDITIONS

The terms and conditions are generally applicable to Blue Financial Services Gh. Ltd, except in the event of a conflict in which these terms shall take precedence to the extent of the conflict.

CUSTOMER INSTRUCTIONS

1. I/We agree that BFSGL needs to receive clear instructions from me/us (in writing or via an authorised medium, i.e. email, WhatsApp, written letter) to initiate, establish and execute transactions connected to a Fixed Deposit Account; and I/We shall provide BFSGL with such clear instructions at all relevant times.
2. In the event that I/We give oral or telephone instructions to BFSGL regarding my/our Fixed Deposit Account, BFSGL reserves the right but shall not be obliged to rely solely on such oral or telephone instruction. I/We agree to indemnify the institution for any adverse situation arising out of such reliance.

MATURITY/TERMINATION/WITHDRAWALS

1. Blue Investment Plus/Box I/We agree that the deposit in my/our Blue Investment Account shall be fixed for the tenor indicated by me/us in the request. Withdrawal of the balance in my/our Blue Investment Account and/or accrued interest, whether partially or fully before the maturity date, may be effected only with BFSGL consent, subject to me/us providing BFSGL with minimum notice of seven (7) working days. BFSGL is hereby authorized to effect my/our withdrawal request only upon such terms and condition as BFSGL may impose in relation thereto, including and without being limited to the imposition of levies and/or penalties determined at its own discretion.
2. All Blue Investment Account: In the event of a partial withdrawal of funds from my/our Blue Investment Account, such funds which are not withdrawn may be treated by BFSGL as a new deposit, and will be subject to the interest rate as well as other terms and condition applicable by the institute as at BFSGL prevailing rate. My/Our principal investment and accrued interest shall be paid in the manner stipulated by me/us. In the event that I/We do not provide a clear instruction on how my/our funds should be treated upon maturity, BFSGL is hereby authorised to exercise its discretion on how the funds shall be treated.
3. The prevailing interest rate shall apply to all rollover investment.
4. Customer forfeits 25% of accrued interest when investment travels less than 50% of agreed tenor.
5. Customer forfeits 15% of accrued interest when investment travels more than 50% but less than agreed tenor.
6. BFSGL shall give 14 days notice to a depositor before closing his/her/its account in credit.
7. BFSGL shall notify the customer two weeks to his/her/its investment maturity.
8. The customer shall be notified via email/sms after the payout of redeemed funds.
9. Repayment of deposit on maturity or termination claim may take 7 working days to have access to value.

PREMIUM INVESTMENT PLUS:

1. Investment to travel for additional fourteen (14) working days if no interest has accrued at the time of terminating investment.
2. Monthly withdrawal of interest.
3. Monthly interest withdrawal takes effect after 31 days.
4. Full redemption takes effect only after 14 days if investment travels less than 6 month.

MANDATE

1. Anyone to sign to effect transactions: Two to sign to effect transactions: Others Specify: _____

SIGNATORIES

Name: _____	<input type="text"/>	<input type="text"/>
Date: _____	<input type="text"/>	
Name: _____	<input type="text"/>	<input type="text"/>
Date: _____	<input type="text"/>	
Name: _____	<input type="text"/>	<input type="text"/>
Date: _____	<input type="text"/>	

DECLARATION

I/We _____ confirmed that the information provided above is correct.

❖ *Blue disclaims liability for any funds/assets deposited by you which are subsequently found to have derived from illegal sources or activities.*

FOR OFFICE USE ONLY

Please select appropriate customer risk profile: Low Medium High Caution List Yes No

	NAME	SIGNATURE
DEPOSIT CONFIRMATION BY	<input type="text"/>	<input type="text"/>
CONFIRMED AMOUNT	<input type="text"/>	INVESTMENT NUMBER: <input type="text"/>
BOOKED BY	<input type="text"/>	<input type="text"/>
APPROVED BY	<input type="text"/>	<input type="text"/>