



UNIT TRUSTS

www.cbagroup.com

Additional Units Buying Form

ALL APPLICANTS

Account Name \_\_\_\_\_

Portfolio Code \_\_\_\_\_ ID/Passport No \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_

JOINT APPLICANT(S)

Names	ID/Passport No.	Signatures	Date
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

CORPORATE APPLICANT (To be filled out by Companies, NGOs, Associations/Societies, Partnerships and Trust Funds.)

Authorised Signatories	ID/Passport No.	Signatures	Date
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

BUYING INSTRUCTIONS (Minimum additional amount is KES 5,000/= for each of the Unit Trust Funds)

Name of Fund	Account Details	Amount
CBA Money Market Fund	Bank: Commercial Bank of Africa Account No.: KES 1553000010001	
CBA Equity Fund	Bank: Commercial Bank of Africa Account No.: KES 1590300010001	
Total		

PAYMENT METHOD/ INSTRUCTION (Specify)

- Cheque     
 Local / Internal Transfer     
 International Transfer     
 Bank Deposit

For Internal Transfer Only: Kindly debit my CBA Account Number \_\_\_\_\_ with KES \_\_\_\_\_

SOURCE OF FUNDS

- Savings     Dividends       Sale of asset Investments     Gifts/Inheritance  
 Pension     Donation       Business Profits (Nature of Business) \_\_\_\_\_  
 Others (specify) \_\_\_\_\_

IMPORTANT INFORMATION

1. The units will be allocated on the 3rd working day following the date of receipt of funds.

OFFICIAL USE ONLY

Staff Name \_\_\_\_\_ Branch \_\_\_\_\_ Signature \_\_\_\_\_

Reviewed by \_\_\_\_\_ Date \_\_\_\_\_ Signature \_\_\_\_\_