

## Equities Portfolio Advisory Services

We're glad you've decided to avail our Equities Portfolio Advisory Services. Let's get started.

### What you need to have:

1. Active MakeTrade Account
2. Accomplished Equities Portfolio Advisory Services Form (please see below)

### How to enroll in our EPA service:

1. Please read the form then fill-up your account details as shown below. Kindly sign on the Primary Account Holder section or as applicable (if you have multiple accountholders).

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

Account Number: \_\_\_\_\_

\_\_\_\_\_  
Primary Account Holder  
(Signature over printed name)

\_\_\_\_\_  
Secondary Account Holder  
(Signature over printed name)

\_\_\_\_\_  
Tertiary Account Holder  
(Signature over printed name)

2. Print, scan then send your accomplished form to [support@maketrade.com.ph](mailto:support@maketrade.com.ph) with the subject Equities Portfolio Advisory – (Name).
3. Upon receipt of your EPA form, an email will be sent to your registered email address to confirm your enrollment.
4. Once confirmed, a trusted adviser will contact you to discuss your investment portfolio. You are now on your way to achieving your financial objective!

**It's that easy! Scroll down to begin.**

Date \_\_\_\_\_

**EQUITIES PORTFOLIO ADVISORY  
SERVICES FORM****Maybank ATR Kim Eng Securities, Inc.**Member: Philippine Stock Exchange, Inc. and SIFP  
9/F Tower One & Exchange Plaza Ayala Triangle, Ayala Avenue  
Makati City, Philippines 1226

Telephone: +63(2)625-5888 or +63(2)328-5888

Fax: +63(2)846 26 11

Email: [support@maketrade.com.ph](mailto:support@maketrade.com.ph)Website: [www.maketrade.com.ph](http://www.maketrade.com.ph)*Please fill-out the following fields with the necessary details.***To:** Maybank ATR Kim Eng Securities, Inc.**Subject:** Equities Portfolio Advisory Services (EPA)

This is to inform Maybank ATR Kim Eng Securities, Inc. that I will enrol my account under Equities Portfolio advisory (EPA) services in relation to transactions made in my MakeTrade Account as described below. I understand and agree that because of such additional services, I shall be charged a commission rate of 0.5% on the amount of securities purchased or sold.

This agreement effectively amends the Online Service Agreement which I signed with Maybank ATR Kim Eng Securities.

Below are my account details:

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

Account Number: \_\_\_\_\_

Thank You.

\_\_\_\_\_  
Primary Account Holder  
(Signature over printed name)\_\_\_\_\_  
Secondary Account Holder  
(Signature over printed name)\_\_\_\_\_  
Tertiary Account Holder  
(Signature over printed name)

Acknowledged by:

Approved by:

\_\_\_\_\_  
Registered Salesman  
(Signature over printed name)\_\_\_\_\_  
Head, Retail Equities  
Maybank ATR Kim Eng Securities, Inc.