

FOR OFFICE USE ONLY

Investment Type: New Top up Rollover

If **Top-up**, Referenced Contract Number

Existing Principal Amount (GHS)

Interest Earned as at Date (GHS)

Top up Amount (GHS)

Total Amount being Invested (GHS)

If **Roll-over**, Referenced Contract Number

Maturity Date

Matured Amount (GHS)

Amount Being Rolled-over

Interest Rate (Per Annum)

Relationship Offer Manager's Name

Signature Signature

Date Date

PRINCIPAL CAPITAL
M I C R O F I N A N C E



INVESTMENT FORM

FIXED DEPOSIT
PERIODIC CONTRIBUTION ACCOUNT
INHERITANCE ACCOUNT
GROUP CONTRIBUTION



Hse. No. 46 Anum Tessa Ave. Adjiringanor
East Legon, Accra - Ghana **GD-210-8763**
P.O. Box CT 9878 Cantonment, Accra
T: +233-30-252 8741 / 30-279 7510 / 30-824 3516
E: info@principalcapital.com.gh
W: www.principalcapital.com.gh

Your Success... Our Business

Account Name

Branch

Account Type

Account Number

Date

Name

Tel. Residential Address

Postal Address Occupation

Next of Kin Name Next of Kin No.

INVESTMENT DETAILS

Investment Type: Fixed Deposit Periodic Inheritance Group Contribution

Fixed Deposit

Principal Amount GHS

Amount in Words

Tenure: 91 DAYS 182 DAYS 365 DAYS Others: Specify

Periodic/Inheritance/Group Contribution

Initial Deposit GHS Amount per subsequent contributions GHS

Tenure (Year): One (1) Two (2) Three (3) Five (5) Others: Specify

Terms of Contribution: Weekly: Monthly: Quarterly: Others; Specify

Inheritance

BENEFICIARY (IES)

No.	Name Of Beneficiary	Date of Birth	Contact	Relationship
1	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
2	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
3	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
4	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
5	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Group Contribution

No.	Name Of Members	Date of Birth	Contact	Position in Grp
1	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
2	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
3	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
4	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
5	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Instruction(s) On Maturity

Mode of Payment: Cash Account Transfer Cheque

Source of Funds

Instruction(s) At Maturity

- Rollover Principal and interest Re-invest principal and Pay Interest
 Redeem Principal and Interest Call for Instruction

TERMS AND CONDITIONS OF INVESTMENT TRANSACTION

Please read the following information carefully. Sign and return it to the Relationship Officer/the designated official, only after you have satisfied yourself that you fully understand the provisions. Please feel free to ask for any clarifications (if necessary)

Requirement

*Minimum initial amount for a fixed deposit is GHc500.00

*Minimum of GHS 100.00 for periodic contributions

*One (1) passport size photo

*A valid National Identification Card

*A minimum period of **one week notice** is required for **early** liquidation

*Fixed deposit liquidation before maturity attracts **penalty** as follows:

*30% of the interest earned if investment has travelled less than 50% of agreed tenor

*20% of the interest earned if investment has travelled above 50% of agreed tenor

*No Interest will be paid if investment has travelled below 10 working days.

Disclosure Policy

I hereby confirm that I have read and understand the terms and conditions covering this Investment transaction. Subject to the applicable local laws, I hereby consent to Principal Capital Microfinance Limited or any of its affiliates sharing my information with local or foreign tax authorities and credit bureaus where necessary to establish my tax liability and credit worthiness in any jurisdiction.

Where required by local/domestic or foreign/overseas credit regulators or tax authorities, I consent and agree to PCML to withhold from my account(s) such amounts as may be required according to applicable laws, regulations and directives.

I further consent to notify PCML within a period of 14 days of any changes to my personal circumstances which include but not limited to citizenship, marital status, residential and mailing addresses and contact telephone numbers.

Indemnity Clause

Principal Capital Microfinance Limited (PCML) is committed to ensuring that Trustee Applicant's money (ies) is safeguarded and to reach the designated source.

PCML shall not be liable for any cash or cash cheque deposited by Trustee Applicant at any unauthorized source or with an official of PCML, and Trustee Applicant undertakes to indemnify PCML and keep it fully indemnified against all losses, damages, costs and expense incurred or sustained by Trustee Applicant as a result of depositing cash or cash cheque at an unauthorized source or with an official of PCML.

Customer's Signature

Name

Position if Corporate

Date

Customer's Signature

Name

Position if Corporate

Date