

How to open an account with Imara S.P. Reid

Please complete the online mandate to open an account.

Securities

Below is a link and instructions on how to complete the online mandate.

Click on this link to beginning the process

<http://isprweb.cloudapp.net>


Once you've clicked the link, please follow these 8 steps to complete the process.


Step 1:

Open an Account

Thank you for choosing to open an account with Imara SP Reid.

To proceed, please click on the relevant link below and you will be able to apply for an Investment Account through our online application process. Thereafter you can submit your FICA documents, through this site.

 [New Mandate Form](#)
Create a new mandate form

 [Upload Documents](#)
Upload supporting documents

Step 2:

Client Mandate Form Request

Please provide us with the following information so that we can compile a mandate form that best suits your needs.

1. Entity Selections

Entity Type
Please select entity type ▼

Is the account for an individual or a legal entity?

2. Product Selection

Account: Please select an account ▼ Product: Please select a product c ▼

Below "Account" select Account to be held with Imara, unless you have previously appointed your own custodian.

Below "Product" select Equity and derivative. Select your Portfolio Manager

Portfolio Manager
Assign me a Portfolio Manager ▼

3. Your Details

First Name(s) Surname
 First name Last name

Email Contact Number
 Email address Telephone Number

Who/What are you creating this account for?
 eg. Son, Wife, Me, Company

4. Additional Signatories

Does your mandate require additional signatories?
 No ▼

If you are opening the account for yourself, fill in Me, or fill in the relation of the account holder.

Below "Additional signatories" you should fill in the relevant full name, and select Yes below "Does your mandate require additional signatories"

Start

Step 3:

Securities

Client Mandate Form - Controlled (Equities and Derivatives)

1. Your Details **2. Preferences** 3. Your Account 4. Investor Profile 5. 3rd Party Details 6. Exemptions

1. Email Preferences

Preferred Email Address *

Select and email address ▼

Select your email address and research preferences.

2. Document Preferences

Do you want to receive ISPR's research?
 Yes No

Do you want to receive documents via email/post?
 Email Post

Previous **Next**

Step 4:

Client Mandate Form - Controlled (Equities and Derivatives)

1. Your Details 2. Preferences **3. Your Account** 4. Investor Profile 5. 3rd Party Details 6. Exemptions

1. Securities

Execution of this mandate will be on the following basis:

Execution Only (Non-discretionary) Advisory Portfolios (Advisory with discretion) Full Managed (Full discretion)

Choose between "Execution only" or "Full managed" by clicking the bubble in front of it.

Make your choice according to the definitions below.

Non-Discretionary:
 Execution only portfolios are not managed by ISPR and the transactions are only affected on the basis of your prior instruction and consent.

Advisory without Discretion:
 ISPR will advise you on the management of your portfolio. Such advice is guided by our investment philosophy, taking into account your investment objectives, risk profile and constraints.

Full Discretion:
 You hereby authorise ISPR to manage your Client Account in its full discretion in order to endeavour to achieve your investment objectives specified, taking into account your risk profile and constraints.

2. Derivatives

Do you want ISPR to trade in Derivatives on your behalf?
 Yes No

If you would like to trade derivative instruments select Yes and select the specific instruments you'd like to trade.

3. 3rd Parties

Have you appointed a 3rd party to manage your account?
 Yes No

Previous **Next**

Step 5:

Securities

Client Mandate Form - Controlled (Equities and Derivatives)

1. Your Details 2. Preferences 3. Your Account **4. Investor Profile** 5. 3rd Party Details 6. Exemptions

1. General Information

Since you selected Execution Only in the previous step you are not required to completed this step.

2. Banking Details

Account Holder Name

SA Exchange Control Status

Bank Branch Code Swift Code

Account Number Payments to be done on: Amount to be paid:

3. Corporate Actions

What is your preferred option on a corporate action event?

4. Global Custodian Details (Only applicable if you have your own custodian.)

5. Settlement Details For South African Market (Only applicable if you have your own custodian.)

Fill in your bank account details and choose your preferred option regarding a corporate action event.

Step 6:

3rd party details are not required unless someone else will be transacting on the account on your behalf.

Step 7:

Please note individual are not exempt from dividend withholding tax.

Step 8:

Click on submit mandate when complete.