Chinabank
Trust and Asset Management Group

CLIENT SUITABILITY ASSESSMENT (CSA) Individual / Joint

Branch/Booking Unit (if applicable):

This Client Suitability Assessment (CSA) will be used in assessing your investment profile based on your investment objectives, cash flow requirements, risk tolerance and financial profile. Please remember that there are no right or wrong answers. Simply indicate what is most applicable to you under the circumstances cited. Your replies shall be scored and totaled to arrive at your risk profile. Trust and Asset Management Group ("TAMG") / Certified UITF Sales Personnel ("CUSP") will use the result of this assessment as guide to present and/or recommend investment alternatives suitable to your needs and objectives. Insufficient information may result to inappropriate products/services. The CSA form and the results thereof are not intended to be construed as solicitation for an offer to sell or buy any financial products and services nor should this be considered as an investment advice.

This CSA should be accomplished prior to the purchase of or subscription/placement in any investment product and must be updated at least every three (3) years, unless you notify us of any changes or updates in your financial status in the interim. If TAMG does not receive any such notice before the end of the 3-year period, your existing financial and investment profile shall continue to apply without any changes, and your account shall be continuously administered or managed according to this CSA.

 Client Name (Last Name, First Name, Middle Name)
 Client Type
 Client Number

					Individua	mary) 🔲 Joint (Seconda		
Sou	rce(s) of Funds (Choose all that a	apply)		What is your Estimated N	·		Date Accomplished	
		Inheritance		Less than PHP 5M		HP 30M to PHP 100M	(mm/dd/yyyy)	
		Retirement		PHP 5M to PHP 29M				
<u> </u>		—						
1.	INVESTIBLE ASSET. How much	•	ay be used for inv	Ū		_		
	□ 0% - 25% <i>(1)</i> [🗌 26% - 50% <i>(</i> 2)		🗌 51% - 75% <i>(</i> 3)			Above 75% <i>(4)</i>	
2.	INVESTMENT OBJECTIVE. What	at is your main objective	e in investing?					
	🗌 Capital Preservation. To pro	tect my capital (1)						
	☐ Income. To generate a regul	, , , , ,						
	☐ <i>Total Return.</i> To achieve inc	()	from interest div	vidends or distributions ea	ned from inve	estments and capital app	reciation (3)	
	—	1 0	,					
3.	INVESTMENT HORIZON. How lo	ong do you intend to ke	ep your funds inv	vested?				
	Less than 1 year (1) Between 1 to 3 years (2)			Between 3 to 5	Between 3 to 5 years (3)			
4.	LIQUIDITY REQUIREMENT. Ho	w important is the liquid	dity of your funds	?				
	Very important. I need to dra	aw from my funds regula	arly (1)					
	Moderately important. I do n	, ,	,	short-term. (2)				
	☐ Slightly important. I have oth		()	the next 3 ye	ears. (3)			
	☐ Not important. I have other s					()		
5.	RISK TOLERANCE. Generally, I					. ,		
Ј.	•		0		•			
	\Box No Risk (1)	Minimal Risk/Minima	I Amount of Loss	s (2) 🗌 Moderate Risk	/Moderate An	nount of Loss (3)	High Risk/High Amount of Loss (4)	
6.	KNOWLEDGE AND EXPERIEN							
	below based on what is applicabl	le to you in terms of you	ur knowledge and	d experience. Only the hig	hest score w	vill be considered from	among the answers below.	
			No Knowledge a			With Knowledge and Les		
			No Experience	e But No Expe	rience	than 3 Years Experience	e 3 Years Experience	
	a. Bank Deposits / Time Depo	osits	(0)	(0)		(0)	(1)	
	b. Money Market Funds (UITF	Fs/Mutual Funds)	(0)	(1)		(1)	(1)	
	c. Government Securities		(0)	(1)		(2)	(3)	
	d. Privately Issued Bonds / Co	ommercial Papers	(0)	[] (1)		(2)	(3)	
	e. Promissory Notes		(0)	(1)		(2)	(3)	
	f. Bond Funds (UITFs/Mutual	Funds)	(0)	□ (1)		(2)	(3)	
	g. Balanced Funds (UITFs/Mu	utual Funds)	(0)	(2)		(3)	(3)	
	h. Equities (Preferred/Commo	on Shares)	(0)	(2)		(5)	(8)	
	i. Equity Funds (UITFs/Mutua	al Funds)	(0)	(2)		(5)	(8)	
		,	.,	.,			, ,	
			(0)	(2)		(3)	(5)	
	j. Foreign Currency k. Structured Products		(0)	(2)		(3)	(5) (8)	
	j. Foreign Currency							
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