



BRIVIAR FINANCIAL ADVISORS LTD

P.O BOX 10200-234, NAKURU

GSM-0707573444

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www.rbadvisors.co.ke

BUSINESS PLAN APPLICATION FORM

PART A: - PERSONAL INFORMATION

MEMBER NAME.....

PHONE NO.....DATE OF BIRTH.....

ID NO.....

POSTAL ADDRESS.....

EMAIL ADDRESS.....

PRODUCT.....DURATION-YEARS MONTHS

MARITAL STATUS. SINGLE MARRIED DIVORCED WIDOWED

PART B: - NEXT OF KIN INFORMATION

NAME.....

PHONE NO.....

ID NO.....DATE OF BIRTH.....

POSTAL ADDRESS.....

EMAIL ADDRESS.....

MARITAL STATUS. SINGLE MARRIED DIVORCED WIDOWED

PART C: - DOCUMENTS TO ATTATCH

1	ID COPIES-(OWNER, NEXT OF KIN)
2	COPY OF K.R.A PIN
3	PAYMENT ACCOUNT DETAILS (OPTIONAL)
4	PASSPORT SIZE PHOTO

PART D: - TERMS AND CONDITIONS

GRANT

BRIVIAR Financial advisors limited may approve or decline your application for services offered after a thorough background check. The company is obliged to give without restrain, reason to a decline or approval of an application.

VARIATIONS

The company will advise the applicant on any changes in the base of rates, charges and fees by publication of notice in local or national newspapers through the offered means of communication. The applicant will be deemed to receive the information on changes in a duration spun of 5 days from the day of publication.

JOINT AND SEVERAL LIABILITY

It is understood that any money credited to our platforms through your account and received in our database will be placed in a fixed account which will offer you 5% income annually unless you offer contrary instructions. In case of death your money will be disbursed to the person indicated as your next of kin once completed the 'transfer of funds due to death' process. It is agreed that all funds received in the company by applicant on our behalf shall be credited accordingly.

INTEREST

Interest on the facilities offered will be calculated and paid on credited amount on an interest rate of 5% for money management and 6.5% on investment plan. Due to the linking of the company with financial institutions reserves the right to change the base of rate from time to time.

INSURANCE

The company requires the applicant to take a personal insurance cover plan. This is to assist our clients on risk based issues that will allow our client navigate without having to interfere with their investments. The applicant understands that for the insurance to be effective she/he should ensure duly payment of the installment on the terms indicated.

GOVERNING LAW

The contract shall be governed by and construed in accordance with the laws of the republic of Kenya.

SECURITY

The company agrees to offer security on the applicant's money and tangible securities that the company might have purchased for the applicant. The applicant is obliged to not share crucial information with other people to avoid fraud and in-case of risk noticed in his/her personal data linked to the account is to report the issue to our office within 12hrs to avoid loss of funds.

DISCLOSURE OF INFORMATION

The company may use your personal information in evaluating your application. The company may share your information with credit reference or rating agencies. The applicant authorizes the company to use the information obtained by the company for such purposes as the company deems appropriate.

PURCHASES

The company takes responsibility of purchasing assets for the applicant in accordance with the current market value. The applicant has full authority to request cancellation of a request on purchase of any asset or project financing with 36hrs after approval and affirmation by signing. The applicant has the right to be compensated in-case of mismanagement of his/her funds during a project ongoing. The applicant agrees that the assets purchased will be registered jointly to the company and later on transferred to the client once completed the full payment. The applicant is aware the charges on transfer of the asset will be debited from his/her account.

COMMITMENT

The applicant agrees during this term created hereby is not to undertake any other company or firm except **BRIVIAR** Financial Advisors LTD whether directly or indirectly without the consent of the company through writing. No waiver by the company shall be effective unless it is in writing.

IDEMNITY

The applicant agrees to fully indemnify the company against all costs and expenses (including legal fees) arising in any way in connection to the applicants accounts, these terms and conditions, in enforcing these terms and conditions and any incurred amount during legal proceedings or whatsoever. If there is no interference with the insurance funds the applicant is qualified to request their money back after the duration filled for the insurance.



PART E: - DECLARATION OF APPLICATION

I do hereby declare that the foregoing particulars provided are true in respect to part 'A' above to my best of knowledge and belief. I agree to abide by the terms and conditions of the company in respect to part 'D' above. I agree not to change my monthly deposit account in the company without offering a written letter indicating so. This agreement has been freely signed by the above mentioned without any threat, pressure or promise of a reward.

Signature of applicant.....Date.....

PART F: - DECLARATION BY NEXT OF KIN

I do hereby confirm that i know the applicant as of good standing and attest of his/her worthiness. By signing this form i do hereby authorize the company to treat me as a guarantor as per the company's policy.

Signaturerelationship.....Date.....

Signature.....Date.....

ACCEPTANCE

I confirm that I have read the terms and conditions (as printed above) governing the contact and agree to bind by them for application approval.

Signature of applicant.....Date.....

Director's signature.....Date.....

Lawyers signature.....

Lawyer stamp

Company stamp