

Margin Limit Application Form (RM06-01)

保證金額度申請表 (RM06-01)

Date 日期 _____

Remarks 備註

1. Please return the instruction to us by e-mail hello@sofi.hk or in person to our office or by FAX to +852 2693 8860.
請透過電子郵件 hello@sofi.hk 或親自到我們辦公室或傳真至 +852 2693 8860 將指示回傳給我們。
2. All account holders must sign on the form.
所有帳戶持有人必須簽署。

For assistance, please contact Customer Service Hotline at +852 2693 8888. 如需協助，請致電客戶服務熱線 +852 2693 8888。

Account Details 帳戶資料

Applicant's Account Number 申請人帳戶號碼 _____

Account Name 帳戶姓名 _____

Requested Margin Limit (HK\$) 申請保證金額度 (港元) _____

Margin Limit 保證金額度

Existing Margin Limit (HK\$) 現時保證金額度 (港元) _____

Related Account 關聯帳戶 _____

Relationship 關聯 (Spouse 配偶 / Others 其他) _____

Aggregated Margin Limit (HK\$) 現有保證金額度 (港元) _____

- I hereby declare and agree that all information previously provided to SoFi HK, including but not limited to my employment details, remains true, accurate, and complete. I acknowledge that this margin limit update is subject to SoFi HK's internal review, and the requested changes will not take effect until they are approved and completed in SoFi HK's systems.

本人特此聲明並同意，此前向 SoFi HK 提供的所有資料（包括但不限於就業詳情）均屬真實、準確及完整。本人確認此保證金限額更新申請須經 SoFi HK 內部審核；在 SoFi HK 系統批准及完成處理前，所申請的變更不會生效。

Signature 簽名 _____

To be Completed by Licensed Representative / Registered Staff 由持牌代表或註冊人士填寫

Submission Check List 核對清單

- Supplementary Client Information (e.g. Asset / Income Proof)
客戶補充資料 (例如: 收入證明/資產證明)
- Change of Personal Details Application Form
更改個人資料申請書
- I hereby declare that I had contacted with client and confirmed that the information contained in this margin limit application are true, complete and correct
本人已與客戶聯絡並確認載於本保證金額度申請表的資料乃屬真實、完整及正確

Licensed Representative / Registered Staff Signature
持牌代表或註冊人士簽名
(CE No. _____)