

Individual and joint account application

For individual or joint accounts. Complete the details for every owner. Account opening remains subject to AH review. The information is confidential and used for account opening and due diligence.

Order minimum: Confirmed for the selected product in the written quotation. **Minimum storage fee:** USD 75 per quarter per storage location once metal is deposited. Confirm product and fee details with AH before ordering.

ACCOUNT OWNER 1 — PRIMARY CONTACT

Full legal name

Date of birth

Employer

City / town

Country of residence

Phone number

Nationality

Occupation

Permanent residential address

State / province

Postal / ZIP code

Email

ACCOUNT OWNER 2 — IF APPLICABLE

Full legal name

Date of birth

Employer

City / town

Country of residence

Phone number

Nationality

Occupation

Permanent residential address

State / province

Postal / ZIP code

Email

Additional account owners

ACCOUNT OWNER 3 — IF APPLICABLE

Full legal name

Date of birth

Employer

City / town

Country of residence

Phone number

Nationality

Occupation

Permanent residential address

State / province

Postal / ZIP code

Email

ACCOUNT OWNER 4 — IF APPLICABLE

Full legal name

Date of birth

Employer

City / town

Country of residence

Phone number

Nationality

Occupation

Permanent residential address

State / province

Postal / ZIP code

Email

Identification and due diligence

PROVIDE FOR EACH NAMED OWNER

- A clear, current colour copy of a passport or driver's licence.
- Recent proof of residential address dated within the last three months, such as an accepted utility bill, bank statement or lease.
- The source of funds or wealth and supporting information if requested by AH.
- Political exposure information for each owner and relevant connected person.

DECLARATIONS

Main source of funds or wealth

Are all account owners the beneficial owners? If no, explain

Is any owner a politically exposed person? If yes, identify and explain

AH will provide a confirmed secure route for identification material. The form does not request identity documents by reply to an unexpected email.

Purpose and declaration

ADDITIONAL INFORMATION

Initial intent: buy and store / deposit existing metals / delivery / undecided

How did you learn about AH?

Have you spoken with an AH representative? Name

Emergency contact name, phone and email (optional; not a beneficiary)

Optional: I consent to quarterly newsletters and product emails (Yes / No)

APPLICANT DECLARATION

I confirm that the details in this application are true, correct and complete to the best of my knowledge. I will provide information AH reasonably requests for due diligence and comply with applicable legal and tax obligations. AH may decline or defer an application pending its checks.

I acknowledge that the product-specific order minimum is confirmed in writing and that the USD 75 quarterly minimum storage fee per storage location begins only after metal is deposited. Product availability, current pricing, storage terms and any other charges require a separate written confirmation. Payment for accepted orders is by approved bank wire according to AH's invoice.

Signature of owner 1

Date

Signature of owner 2

Date

Signature of owner 3

Date

Signature of owner 4

Date

Return the completed form using the channel AH confirms. Questions: info@aurumhelvetica.com. An optional beneficiary form follows; its legal effect requires separate review.

Optional beneficiary designation

Complete this optional page only if you wish to propose a beneficiary designation. AH must confirm acceptance and the legal effect for your account and jurisdiction before relying on it.

AH account number (if assigned)

Account name(s)

Marital status

Address, phone and email

PROPOSED PRIMARY BENEFICIARIES

Beneficiary 1

Full legal name

Relationship

Date of birth

Proposed share (%)

Address and contact details

Beneficiary 2

Full legal name

Relationship

Date of birth

Proposed share (%)

Address and contact details

Beneficiary 3

Full legal name

Relationship

Date of birth

Proposed share (%)

Address and contact details

Beneficiary instructions and confirmation

This optional designation is subject to review and written acceptance by AH. It does not amend a will or resolve succession rights by itself. An owner may request to revise a designation in writing, subject to the applicable account and legal requirements.

DETAILS AND DOCUMENTS TO CONFIRM

- The shares of named beneficiaries must total 100% if a percentage allocation is selected.
- A claimant will need suitable evidence of death and identity, plus estate or other documents required for the circumstances.
- Where a trust is named, AH may request governing documents and identification of the relevant persons.
- AH will verify applicable succession, marital property and joint-account rules before releasing any holdings.

ACCOUNT OWNER REQUEST

I ask AH to review the proposed beneficiary details on the preceding page. I understand that AH must confirm in writing whether and how they can be recorded and that the designation is subject to applicable law.

Account owner signature

Date

AH review: Beneficiary designation accepted / further information needed / declined.

AH reviewer and date (internal)