

Owner **DBOI Account Opening Review**

ABR- Please vett the signing authorities & review this account with W-9 for approval (Attn: Pema Sherpa).

Description **New Banking**

KYC#:

NAO#:

Open Activities

REMINDER: KYC Update required for this Customer. Click on "Related To" link.

Type **Call**

Task

Task/Event Record Type **Task**

Due Date **9/5/2014**

Status **In Progress**

Priority **Normal**

Assigned To **Paul Morris**

Comments **Please change the Staus of this task to 'Completed' when the KYC Update is Submitted.**

Notes & Attachments

0858_001.pdf

Type **Attachment**

Owner **Jj Litchford**

Description

[View file](#)

Related To

revised first page of application.pdf

Type **Attachment**

Owner **Kusam Saini**

Description

[View file](#)

Related To

W-9.pdf

Type **Attachment**

Owner **Kusam Saini**

Description

[View file](#)

Related To

W-9 ST and SF.pdf

Type **Attachment**

Owner **Amanda Kirby**

Description

[View file](#)

Related To

SF Account Opening Docs Signed.pdf

Type **Attachment**

Owner **Amanda Kirby**

Description

[View file](#)

Related To

Annual Client Updates

Meeting/Call Date **8/25/2015**

Meeting/Call Type **Phone Call**

Created By **Amanda Kirby, 9/2/2015 3:32 PM**

Meeting/Call Date **9/3/2014**

Meeting/Call Type **Phone Call**

Created By **Amanda Kirby, 9/5/2014 11:53 AM**

AIS Requests