

MEMBERSHIP APPLICATION FORM

Form No:.....

Fortune DT Sacco Society Ltd Branch:..... Application Date:.....

Customer No:..... Full A/C No.

(A) MEMBER ACCOUNT DETAILS

Hon.Mr, Miss, Dr: Last Name..... First Name..... Other Names.....

Sex: Male ☐ Female ☐ Nationality:..... Country of Residence:..... County/City/Town:.....

Marital Status:..... Date of Birth:..... Mobile Number:..... Alternative No:.....

Document of Identity: ☐ National ID ☐ Passport ☐ Alien ID ☐ Others: (specify).....

ID/Passport NO:..... Date of Issue:..... Expiry Date:.....

Email Address:..... KRA Pin:..... Residence:..... Nearest Landmark:.....

Next of Kin:..... Relationship:..... Mobile No:.....

(i) ADD OTHER BENEFICIARIES

NO	NAME	PHONE NO	RELATIONSHIP

(ii) EMPLOYMENT/COMPANY/BUSINESS DATA

(Tick appropriately)

Work Type: ☐ Salaried ☐ Self Employed ☐ Retired ☐ Others (please specify).....

Current Employer/Business:..... Location:..... Telephone No:.....

Sector:..... Profession/Designation:..... Years in Operation:.....

(iii) SIGNATORIES FOR JOINT/GROUP/COMPANY

1. ☐ Mr. ☐ Miss/Mrs. Last Name..... First Name..... Other Names.....

Nationality:..... Residence:..... Nearest Landmark:..... Email :

D.O.B:..... Mobile Number:..... Alternative No:..... Marital Status:.....

ID/Passport NO:..... Date of Issue:..... Expiry Date:.....

2. ☐ Mr. ☐ Miss/Mrs. Last Name..... First Name..... Other Names.....

Nationality:..... Residence:..... Nearest Landmark:..... Email:.....

D.O.B:..... Mobile Number:..... Alternative No:..... Marital Status:.....

ID/Passport NO:..... Date of Issue:..... Expiry Date:.....

3. ☐ Mr. ☐ Miss/Mrs. Last Name..... First Name..... Other Names.....

Nationality:..... Residence:..... Nearest Landmark:..... Email:.....

D.O.B:..... Mobile Number:..... Alternative No:..... Marital Status:.....

ID/Passport NO:..... Date of Issue:..... Expiry Date:.....

4. ☐ Mr. ☐ Miss/Mrs. Last Name..... First Name..... Other Names.....

Nationality:..... Residence:..... Nearest Landmark:..... Email:.....

D.O.B:..... Mobile Number:..... Alternative No:..... Marital Status:.....

ID/Passport NO:..... Date of Issue:..... Expiry Date:.....

2.

(B) ACCOUNT TYPE

I/We wish to open the following Account(s) and undertake to observe, comply and be bound by terms and conditions as well as tariffs made by the Sacco in force and as amended from time to time pertaining to such Accounts per the General terms and conditions documents availed and read by me/us.

Account type: ☐ Current Account ☐ Back Office/Zidisha Shares ☐ Share Capital

How did you first hear about Fortune DT Sacco Society Ltd?.....

(C) DIGITAL SOLUTIONS

I/We would like to enroll for these solutions. Tick ☒ or cancel ☒ where applicable.

☐ Paybill Service ☐ Mobile Banking ☐ Internet Banking

(D) ADDITIONAL SERVICES

I/We would like to enroll for these solutions. Tick ☒ or cancel ☒ where applicable.

☐ Sacco Link ATM ☐ Standing Order ☐ Cheque Book No. of Books..... No. of Leaves.....

(E) OPERATING INSTRUCTIONS

Your signature is required for operating instructions. Please tick ☒ either.

☐ Anyone to sign ☐ Any two to sign ☐ All to sign

(i) AUTHORISED SPECIMEN SIGNATURE/S

SIGN

SIGN

Name:.....

Name:.....

ID NO:.....

ID NO:.....

SIGN

SIGN

Name:.....

Name:.....

ID NO:.....

ID NO:.....

(F) MEMBER INFORMATION CHECKLIST

Valid identification documents obtained and authenticated as per account type:	☐	YES	☐	NO
Photographs captured and authenticated:	☐	YES	☐	NO
All customer contacts obtained:	☐	YES	☐	NO
Mandate signatures obtained:	☐	YES	☐	NO
Mobile banking registered:	☐	YES	☐	NO
Internet banking registered:	☐	YES	☐	NO

(i) FOR OFFICIAL USE ONLY

Information captured by:

Signature.....

Name.....

Date.....

Initial Deposit.....Member Recruited by.....

Designation.....Branch.....

Information verified by:

Signature.....Designation.....

Name.....

Date.....

STAMP

Information authorized by:

Signature.....Designation.....

Name.....

Date.....

STAMP

(G) TERMS AND CONDITIONS

I hereby confirm that I have read, clearly understood, and voluntarily agree to be bound by the Fortune DT Sacco Society Ltd Consolidated Terms and Conditions governing Account Opening, Electronic Banking Services, e-Statements, and e-Alerts.

I acknowledge that these Terms and Conditions outline my rights, obligations, and responsibilities as a member of Fortune DT Sacco Society Ltd, including but not limited to the usage of digital financial services, communication channels, transaction processing, data privacy, and security provisions.

I further understand that Fortune DT Sacco Society Ltd reserves the right to amend, review, or update these Terms and Conditions from time to time, and that such updates will be communicated through the Sacco's official communication channels. Continued use of my account and related services shall constitute acceptance of any such changes.

I confirm that I have been provided with convenient access to the full Terms and Conditions document via the link below and/or through the QR code provided on this form:

<https://shorturl.at/9IH5X>

I agree that it is my responsibility to review the document and seek clarification where necessary before acceptance.

Additionally, I consent to Fortune DT Sacco Society Ltd capturing, storing, and using my photograph and/or biometric information for identification, verification, record-keeping, and security purposes in accordance with applicable laws and internal policies. I understand that this information will be handled with strict confidentiality and used solely for legitimate Sacco operations.

By signing this document, I confirm my acceptance of all the above terms and conditions.



Scan QR code for
Terms and
Conditions

(H) DATA PRIVACY POLICY

Fortune DT Sacco Society Ltd ("us", "we", or "our") is a Sacco regulated by SASRA to offer financial services. We operate the www.fortune.co.ke website, which provides more information about us and our various services/facilities, as well as the Fortune e-Cash Mobile App (the "Service").

Fortune DT Sacco Society Ltd is committed to protecting the privacy and security of personal information in accordance with the Kenyan Data Protection Act of 2019. This Data Privacy Policy outlines how we collect, use, disclose, and safeguard your personal information when you visit our website or engage with our services.

We use your data to provide and improve the Services. By using these Services, you agree to the collection and use of information in accordance with this policy. Unless otherwise defined in this Data Privacy Policy, terms used herein have the same meanings as in our Terms and Conditions.

While using our Service, we may ask you to provide certain personally identifiable information that can be used to contact or identify you ("Personal Data"). We may use your Personal Data to contact you with newsletters, marketing or promotional materials, and other information that may be of interest to you. You may opt out of receiving any or all of these communications by following the unsubscribe link or instructions provided in any email we send.

(I) INDEMNITY Declaration To Fortune DT Sacco Society Ltd.

I/We agree that this account(S) shall be operated solely at the discretion of Fortune DT Sacco Society Ltd and hereby agree to indemnify the Bank at my/our cost against loss or claims arising out due to unsatisfactory performance. I/We confirm having read and understood the general terms and conditions which I/We accept.

Signed this day of 20

Name Signature

Name Signature

Name Signature

Name Signature

Witnessed by: Signature: DATE :