Manulife Investments

辉立证券私人有限公司
PHILLIP SECURITIES PTE LTD
A member of PhillipCapital

Particulars Update Form

Please...

- ✓ Refer to the latest version of the Terms and Conditions for Unit Trust Accounts and Terms of Service available on the iFUNDS platform for detailed information on fees and charges, dealing procedures, and disclosures of transaction information.
- ✓ Complete in BLOCK LETTERS. Incorrect or incomplete forms will not be processed.
- ✓ Note that this form is only for clients with an iFUNDS account and without any insurance policies with Manulife. If you have an existing insurance policy with Manulife, please visit https://www.mymanulife.com.sg/ to update your details.

Please remember to...

- ✓ Countersign any amendments.
- ✓ Ensure that the appropriate boxes are checked.
- ✓ Submit this form via your financial adviser representative, who will send it to SGP_iFUNDS_Ops@manulifeam.com

1. iFUNDS Account Information

Client Name (as per iFUNDS Account) _____

Client NRIC/ Identification Number _____

Client iFUNDS Account Number _____

2. Update of Personal Details

☐ **Update of Personal Information**

New Name
(Please attach copy of Deed Poll/NRIC) _____

New NRIC/ FIN/ Passport Number _____
(Please attach copy of the identity card/ citizenship certificate OR letter from the Immigration and Checkpoints Authority of Singapore)

Old NRIC/ FIN/ Passport Number _____

New Birthdate
(Please attach copy of NRIC/Passport/Birth Certificate) _____

New Citizenship
(Please attach copy of supporting document e.g. NRIC, Passport) _____

Other Changes
(Please attach copy of supporting document) _____

☐ **Update of Contact Details**

New Mobile Number
(Please indicate country code & area code if overseas) _____

Country _____

New Email Address _____

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☐ **Update of Address**

New Residential Address
(Please attach copy of supporting document, e.g. NRIC, bank statement)

Postal Code _____ Country _____

Mailing Address
(if different from residential address)

☐ Mailing Address is the same as residential address (skip mailing address input)

☐ **Update of Signature**

I would like to change my old signature as per Manulife iFUNDS record with the following new signature.

New signature | Old signature

3. Tax Residency Self-certification

Please complete this section if you would like to update the Tax Residency Self-certification and if you are updating the following information

- Citizenship
- Address to another country
- Mobile number to another country

A. Details of tax residency

Please provide information on your Tax Residency (this will usually be where you are liable to pay income taxes). If you have any questions on how to define your Tax Residency status, please visit https://www.oecd.org/en/networks/global-forum-tax-transparency/resources/aeoi-implementation-portal/tax-identification-numbers.html or speak to a professional tax adviser as we are not allowed to give tax advice.

CRS Declaration of Tax Residency
Tick where applicable (you may tick more than 1)

☐ I am a tax resident of **Singapore**. ☐ Please complete Section 3C (if required) and D

Tax Identification Number (TIN) _____

☐ I am a tax resident of **other country(ies)/ jurisdiction(s)**. ☐ Please complete Section 3B, C (if required) and D

B. Details of foreign tax residency(ies)

Please provide ALL the country(ies)/ jurisdiction(s) (excluding Singapore) in which you are a tax resident and the associated Taxpayer Identification Number.

Country/Jurisdiction of Tax Residency	Taxpayer Identification Number (TIN)	Please tick one of the reasons* if you are unable to provide the TIN	If Reason B has been selected, please indicate why TIN is not available
1		☐A ☐B ☐C	
2		☐A ☐B ☐C	
3		☐A ☐B ☐C	
4		☐A ☐B ☐C	

*Reason:

A. The country where the Account Holder is liable to pay tax does not issue TINs to its residents.
B. The Account Holder is otherwise unable to obtain a TIN or equivalent number.
C. No TIN is required (note: only select this reason if the authorities of the country of tax residency entered above do not require the TIN to be disclosed).

C. Clarification of tax residency

If the country of your residential/mailing address, contact number, country of birth, nationality or citizenship differs from your declared country(ies)/jurisdiction(s) of tax residency, please provide the reason below.

D. Acknowledgment of tax residency

☐ I confirm that I am not a tax resident of any country(ies)/ jurisdiction(s) other than the one(s) that I have declared above. I also agree to provide assistance to Manulife IM (Singapore) for it to comply with relevant tax regulations.

4. Consent to Communication from Manulife IM (Singapore)

Please complete this section if you wish to update your marketing consent preferences.

I acknowledge that Manulife Investment Management (Singapore) Pte. Ltd. may, from time to time, contact me to provide information on exclusive offers or inform me of new products and/or services. Manulife Investment Management (Singapore) Pte. Ltd. will do so via email, SMS, call or other forms of communications. I consent to receiving such communications by:

Email
SMS and/ or Voice call
Mail/ Other forms of communication

5. Declaration and Authorisation by Account Holder

Update of Personal Details

1. I consent to Manulife Investment Management (Singapore) Pte. Ltd. ("**Manulife IM (Singapore)**") collecting, using, disclosing and/or processing my personal data collected in this form for the purpose of complying with my correction/update request and such other purposes stated in the Terms and Conditions for Unit Trust Accounts and Privacy Policy, as may be amended by Manulife IM (Singapore) from time to time.
2. I represent and warrant that the above information is true, accurate, complete, and not misleading in any respect. I authorise Manulife IM (Singapore) to effect the correction(s)/update(s) requested in respect of my iFUNDS account. I shall promptly notify Manulife IM (Singapore) of any changes to the above information. I acknowledge that it is my responsibility at all times to ensure that the information reflected on my profile page available on the iFUNDS platform is up to date, regardless of whether I have notified Manulife IM (Singapore) or my financial adviser representative of such change.

CRS Declaration

Please note that providing information which is known to be false or misleading in any material particular is an offence under the Income Tax Act 1947 of Singapore, and may be subject to a penalty of a fine not exceeding S$10,000 and/or imprisonment of up to 2 years. For more information, please refer to Section 105M of the Income Tax Act 1947.

1. I declare that the information provided in this form is, to the best of my knowledge and belief, correct and complete.
2. I acknowledge and understand that the information contained in this self-certification and any reportable account(s) may be reported to the tax authorities of the country/jurisdiction which this account(s) is/are maintained and exchanged with tax authorities of another country/jurisdiction or countries/jurisdictions in which I may be tax resident pursuant to intergovernmental agreements to exchange financial account information.
3. I agree to notify Manulife IM (Singapore) within 30 days of any errors, omissions or changes in the information provided in this form.

Marketing

1. I am aware that the marketing consent provided by me under Part 4 of this form is in addition to and does not supersede, vary or nullify any other marketing consent which I may have provided previously in respect of marketing purposes, unless my marketing consent is withdrawn through later submission of this form.
2. I hereby represent and warrant that I am the user and/or subscriber of the telephone number provided by me in this form or other forms furnished by Manulife IM (Singapore).

Marketing Consent Withdrawal

1. I understand and agree that if I have withdrawn my consent to receive marketing communications from Manulife IM (Singapore) via any of the communication channel(s) by selecting "No" for such communication channel(s) under Part 4 of this form, I will no longer receive any marketing messages via such communication channel(s) as indicated above once Manulife IM (Singapore) has processed this form. Please allow up to 30 days from Manulife IM (Singapore)'s date of receipt of this completed form for Manulife IM (Singapore) to effect this withdrawal of consent.
2. I hereby represent and warrant that I am the user and/or subscriber of the telephone number provided by me in this form or other forms furnished by Manulife IM (Singapore).

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Particulars Update Form

Important notes:

1. Only completed forms with original signature will be processed.
2. Please allow up to 30 days for the update(s) to be completed.
3. If you wish to understand the list of purposes for which your personal data may be used or disclosed, you may refer to the Terms and Conditions for Unit Trust Accounts and the Privacy Policy located at our website.
4. By signing this form, I confirm that I have read, understood and agree to the Terms and Conditions for Unit Trust Accounts (in particular Schedule 2 on Risk Disclosures) and Terms of Service, Cancellation Policy, Terms of Use, Privacy Policy, Best Execution Policy and all the statements above, and confirm that I wish to proceed with the above instruction.

Authorised Signature
(If there is an update of Signature, please use your new Signature above)

E-sign _____ **or** Upload signature image _____

Full Name _____

Date _____

Completed by

Agent Name _____

Agent Code _____