


FAME - Quick Start Guide (Account Opening)

1) Select your client's desired account type (For Individual):

| 1. Choose your account type(s) and service(s) *Circle where applicable | |
|--|--|
| Trading Account type <input type="checkbox"/> Investment <input type="checkbox"/> Margin Financing <input type="checkbox"/> Prepaid <input type="checkbox"/> Cash Management <input type="checkbox"/> Securities Financing <small>— V (enclose Philip Financial Pte Ltd Application Form) —</small> | More Services <input type="checkbox"/> Multi-Currency Facility <input type="checkbox"/> Contract For Difference <small>(enclose Form 13)</small> <input type="checkbox"/> Securities Borrowing and Lending <input type="checkbox"/> Others: _____ |
| Advisory Wrap <input type="checkbox"/> Unit Trust (Cash / CPFOA / CPFSA / SRS)* | <input type="checkbox"/> Securities (Cash) |
| Managed Account <small>(enclose MA service form)</small> <input type="checkbox"/> Cash <input type="checkbox"/> SRS | Service Name: _____ Wrap Fee: _____ |

- Cash Management (**UT Non-Wrap Account**) – Supports multiple fund sources in a single account.
 - Advisory Wrap (**UT Wrap Account**) – *Circle* the Fund Sources and indicate Wrap Fee. One fund source per account.
 - Securities Wrap** (UT Wrap Cash + Securities Account) – Indicate Wrap Fee.
 - Managed Account** – For eligible firms only.
 - (Optional) **Multi-Currency Facility** – To hold foreign currencies without auto-conversion.
- Fill up client's details (Sections 2 to 6). Provide CPF/SRS bank details if the client is opening accounts for the relevant fund source.
 - (Optional for Non-Wrap Accounts) Sign up for Excess Fund Management in Section 7. Click [here](#) to find out more.
 - Client to sign in Section 8.

| IV. CONSENT TO RECEIVE ELECTRONIC CONTRACTS AND STATEMENTS FOR ONLINE TRADING | |
|---|---------------|
| <small>For POEMS online trading, I agree and confirm my consent to PSPL giving me trade contract notes and other statements of account electronically in respect of the Account(s) opened with PSPL. I understand and accept that all contract notes and statements given by PSPL will be deemed given as from PSPL posting the same on or at its online services website server which is accessible by me at www.psems.com.sg.</small> | |
|  _____ Signature of Applicant | _____ Date |
| For Office Use Only | |

5) Financial Advisory Representative to tick, indicate FAR code and sign in FA Name/Signature box.

| For Office Use Only | |
|---|--------------------------|
| <input type="checkbox"/> I confirm having attended to the applicant in person face to face: | <input type="checkbox"/> |
| FA/PIC Code/Name: _____ / _____ | T |
| Signature: _____ | S |

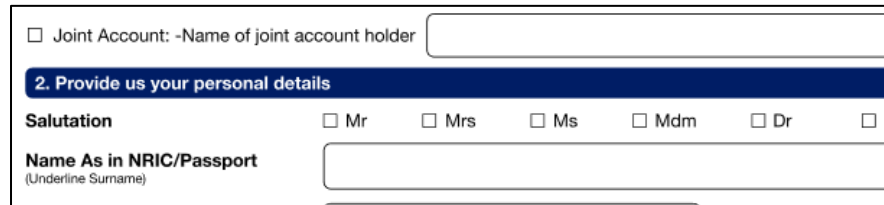
Additional Documentation Required:

- Scan of **NRIC** for Singaporeans, **Malaysian IC** for Malaysians, **Passport** for foreigners.
- **Proof of Billing** (3 Months Validity) if Mailing Address differs from Residential Address.
- **Client Acknowledgement Form** for Non-Wrap and Wrap Accounts.
- **P1 Form** for Managed Accounts.

Additional Notes:

- **For Joint Account Applications:**

- 2 sets of Account Opening Forms need to be filled up.
- 1st set for Person A's details with Person B indicated as the joint account holder, and vice versa for the 2nd set.



The screenshot shows a portion of a web form. At the top, there is a checkbox labeled "Joint Account: -Name of joint account holder" followed by a text input field. Below this is a dark blue header bar with the text "2. Provide us your personal details". Underneath the header, there is a "Salutation" label followed by radio button options for "Mr", "Mrs", "Ms", "Mdm", "Dr", and "C". Below the salutation options is a "Name As in NRIC/Passport" label with the subtext "(Underline Surname)" and a corresponding text input field.

- 1 x Client Acknowledgement Form required (For **Non-Wrap** and **Wrap Accounts**), or 1 x P1 Form required (For **Managed Accounts**).
 - **For All Accounts:** Kindly note that 1 Account Application Form can be used to open multiple account types for the same client.
 - You can find our commonly used forms at <http://home.fame.com.sg/support/>, and the complete set of our forms in FAME (Documents tab -> Documents and Forms).
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