

FAME Online Account Opening Full Guide

As of 23/11/2021

Built for Advisers

To allow advisers to be in control of the account opening
Do it together with clients over video conference/ face to face

Adviser logs into FAME



[Home](#)

FAME Login

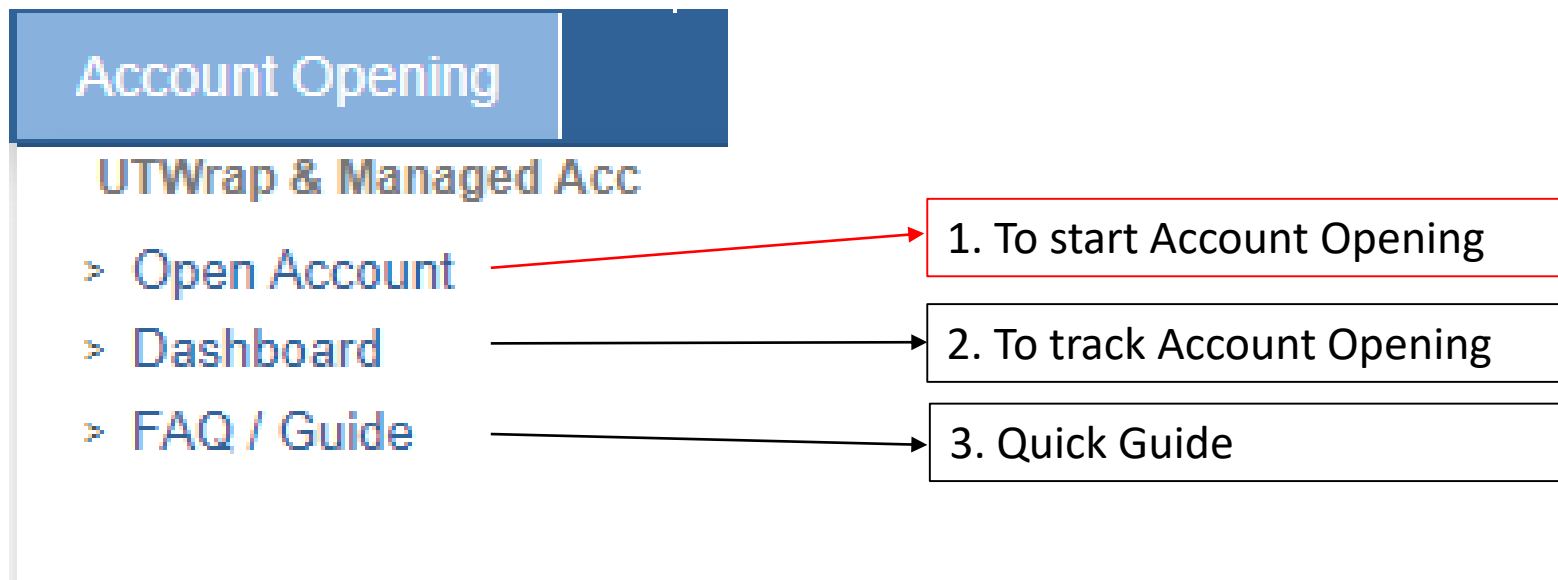
Login ID:

Password:

[Login](#)

[Forgot Password?](#)






Access the 'Account Opening' Tab





1. Open Account

Adviser can select account types and wrap fee/ service to be applied

Account Opening

<input type="checkbox"/> UT Wrap Cash	Select Fee Code 
<input type="checkbox"/> UT Wrap CPFOA	Select Fee Code 
<input type="checkbox"/> UT Wrap CPFSA	Select Fee Code 
<input type="checkbox"/> UT Wrap SRS	Select Fee Code 
<input type="checkbox"/> Securities Wrap Account	Select Fee Code 

<input type="checkbox"/> Managed Account	Select Fee Code 
<input type="checkbox"/> Managed Account SRS	Select Fee Code 
<input type="checkbox"/> UT Non Wrap Account	

Reset

Confirm

Combinations

Account Opening

<input checked="" type="checkbox"/> UT Wrap Cash	(30) AndrewTest 1.5%	▼	<input type="checkbox"/> Managed Account	Select Fee Code	▼
<input checked="" type="checkbox"/> UT Wrap CPFOA	(31) AndrewTest 0.4%	▼	<input type="checkbox"/> Managed Account SRS	Select Fee Code	▼
<input checked="" type="checkbox"/> UT Wrap CPFSA	(31) AndrewTest 0.4%	▼	<input type="checkbox"/> UT Non Wrap Account		
<input checked="" type="checkbox"/> UT Wrap SRS	(30) AndrewTest 1.5%	▼			
<input type="checkbox"/> Securities Wrap Account	Select Fee Code	▼			

Advisers can send instruction for additional account types to be opened via the Additional Info Template

- > [Open Account](#)
- > [Additional Info Template](#)
- > [Dashboard](#)
- > [FAQ / Guide](#)

Copy URL for later use or proceed

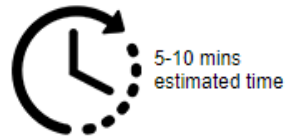
Account Opening URL ×

URL	<input type="text" value="https://k2.psdev.com/Runtime/Runtime/Form/Page0GateForm/?"/>
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Myinfo or Manual



For Singpass users, retrieve your personal data with MyInfo to automatically fill up the form.



Retrieve Myinfo with Singpass

Apply by filling up the form.



Fill-up Form

Myinfo QR code
pops up for client
to scan

Singpass Authorisation

The logo for Singpass, featuring the word "singpass" in a bold, lowercase, sans-serif font. The "i" is black, and the "ngpass" is red.

Singpass retrieves personal data from relevant government agencies to pre-fill the relevant fields, making digital transactions faster and more convenient.

This digital service is requesting the following information from Singpass, for the purpose of demonstrating MyInfo Staging APIs

Pre-filled Application



Pre-filled Application with **singpass**

PERSONAL DETAILS

Salutation

Mr

Name

MR MYINFO A

Name (Alias)

MYINFOALIAS E

Name (Hanyu Pinyin Alias)

ALIAS HANYUB

Sex

MALE

Marital Status

MARRIED

Fields to fill - Personal information


Mobile Number

+65 - 97399245

Home Contact Number

-

Registered Address

Singapore 

601288

288A JURONG EAST STREET 21

#08-367

NIL

Email Address

myinfotesting@gmail.com

Ownership of Private Residential Property

true

Yearly Assessable Income (SGD)

100000.00

Mailing Address Same as Registered Address

Singapore 

601288

288A JURONG EAST STREET 21

#08-367

NIL

Fields to fill – Employment Details

WORK DETAILS

Employment Type

Employed ▼

Employer Name

sample

Occupation

sample

Years of Service

12

Employer's Address

Singapore ▼

387355

1 SIMS LANE

Unit Number

ONE SIMS LANE

Highest Educational Background

Bachelor's Or Equivalent ▼

English Proficiency

(ability to read and understand English)

Yes

No

Fields to fill – Financial Information

FINANCIAL INFORMATION

Liquid Net Worth

- <=S\$50,000
- S\$50,001 to S\$100,000
- S\$100,001 to S\$500,000
- S\$500,001 to S\$2 Million
- >S\$2 Million

Source of Funds

- Salary
- Savings
- Commission
- Investment Gains
- Gift / Inheritance
- Own Business
- Others

Estimated Net Worth

- <=S\$50,000
- S\$50,001 to S\$100,000
- S\$100,001 to S\$500,000
- S\$500,001 to S\$2 Million
- >S\$2 Million

Source of Wealth

- Employment Income
- Business Profit
- Commission
- Investment Gains
- Pensions
- Gift / Inheritance
- Others

Have you ever been declared a bankrupt?

Yes

No

Fields to fill – Bank Information

DECLARATION AND BANK INFORMATION

Have you registered with PayNow using your NRIC or FIN?

Yes

No

Singapore-Issued Bank Account

DBS / POSB

OCBC

UOB

Maybank

Declared bank account can be used for direct crediting purposes
You may put a dummy code "12345678" if not declaring

Central Provident Fund Ordinary Account (CPF-OA) Investment Account

DBS / POSB

OCBC

UOB

CPF IA and SRS IA account details will be asked when relevant
ie. If a CPF OA account type is chosen, CPF IA account number is compulsory

Declarations

TAX RESIDENT INFORMATION

I am a

Singapore Tax Resident (TIN: S6005051A)

Foreign Tax Resident

COUNTRY

TAX IDENTIFICATION NO.

(Add new row)

POLITICALLY EXPOSED PERSON (PEP) DECLARATION



I declare that I am a PEP

Yes

No

RELATIONSHIP WITH STAFF

Are you related to any Director, Employee or Remisier of Phillip Securities Pte Ltd?

Yes

No

Terms & Conditions agreement

TERMS AND CONDITIONS



I confirm that I have read, received, understood, acknowledged and accepted all the terms and conditions governing the Account.

Conditions Governing Phillip Securities Accounts
[LEARN MORE >](#)

Guide, Cautionary Notes and Risk Disclosure Statements
[LEARN MORE >](#)

UT Wrap Account Information Sheet
[LEARN MORE >](#)

Accounts & Charges Selected

PREFERRED TRADING REPRESENTATIVE / DEALER / FINANCIAL ADVISOR

House Dealing Team

Specify TR / FA Code: TAN***

Code should auto-detect
adviser's FAME code

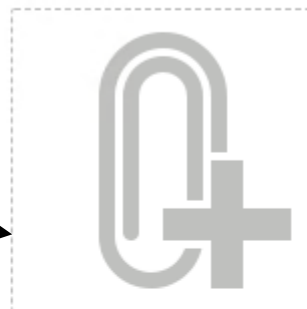
Account Type	Fee/Product
UTW Cash	(30) AndrewTest 1.5%
UTW OA	(31) AndrewTest 0.4%
UTW SA	(31) AndrewTest 0.4%
UTW SRS	(30) AndrewTest 1.5%

Client Acknowledgement For Appointment Of **IPP***** ("External Provider")

Signature

SPECIMEN SIGNATURE

Either upload a picture of client's signature
Or
Key in client's name as per MyInfo



Attach a photo of your signature
(Optional)

By typing your signature and sending it via the internet, you (i) certify, the information on this form (including any prepopulated information) is true and correct; (ii) agree it represents your digital signature which is the equivalent of your written signature and (iii) consent to the use of electronic records to evidence your certification/agreement

Please type your full name: MR MYINFO A

Optional attachment

OTHER DOCUMENTS (OPTIONAL)



Attach photo or document

Any optional attachments can be uploaded

For Managed Accounts, the Schedule + P1
Form is compulsory

Link

Link

Link

Review submission and confirm



Please review your details and confirm

STEP 1: CHOOSE ACCOUNT TYPE

- UT Wrap Cash**
[LEARN MORE >](#)
- UT Wrap CPFOA**
[LEARN MORE >](#)
- UT Wrap CPFSA**
[LEARN MORE >](#)
- UT Wrap SRS**
[LEARN MORE >](#)
- Managed Account**
[LEARN MORE >](#)
- Managed Account SRS**
[LEARN MORE >](#)

BACK

CONFIRM

Submission Successful



Myinfo submissions
create account
numbers on the spot



Thank you!

Your submission has been received.

Manual Fill-in
submissions will require
clients to do a \$1 transfer
to confirm account

ACCOUNT TYPE	ACCOUNT NO
UTW SRS	1009112
UTW SA	1009113
UTW OA	1009114
UTW Cash	1009115

Thank you for opening an account with us. You will receive an email notification once your account has been approved

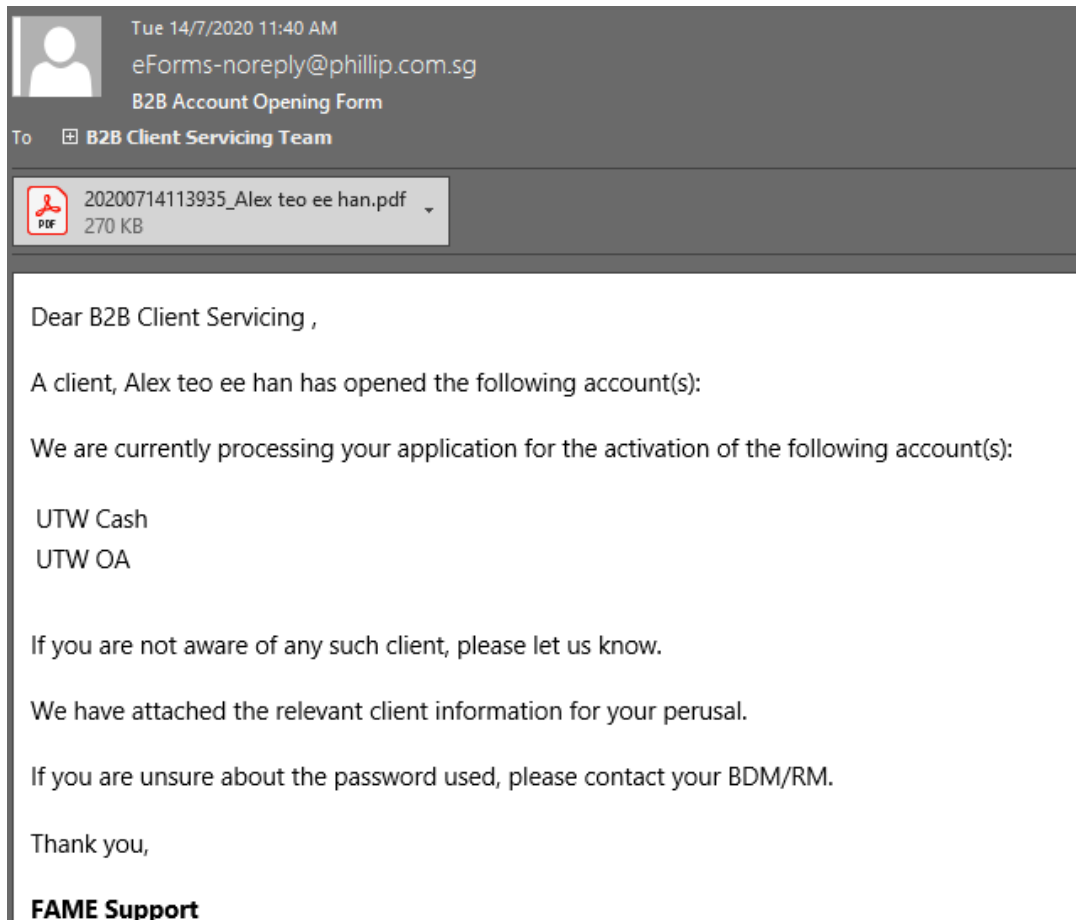
Need Help?

Contact **ADV***** at 762151 or email uni31@717.xx for assistance.

End of Adviser + Client

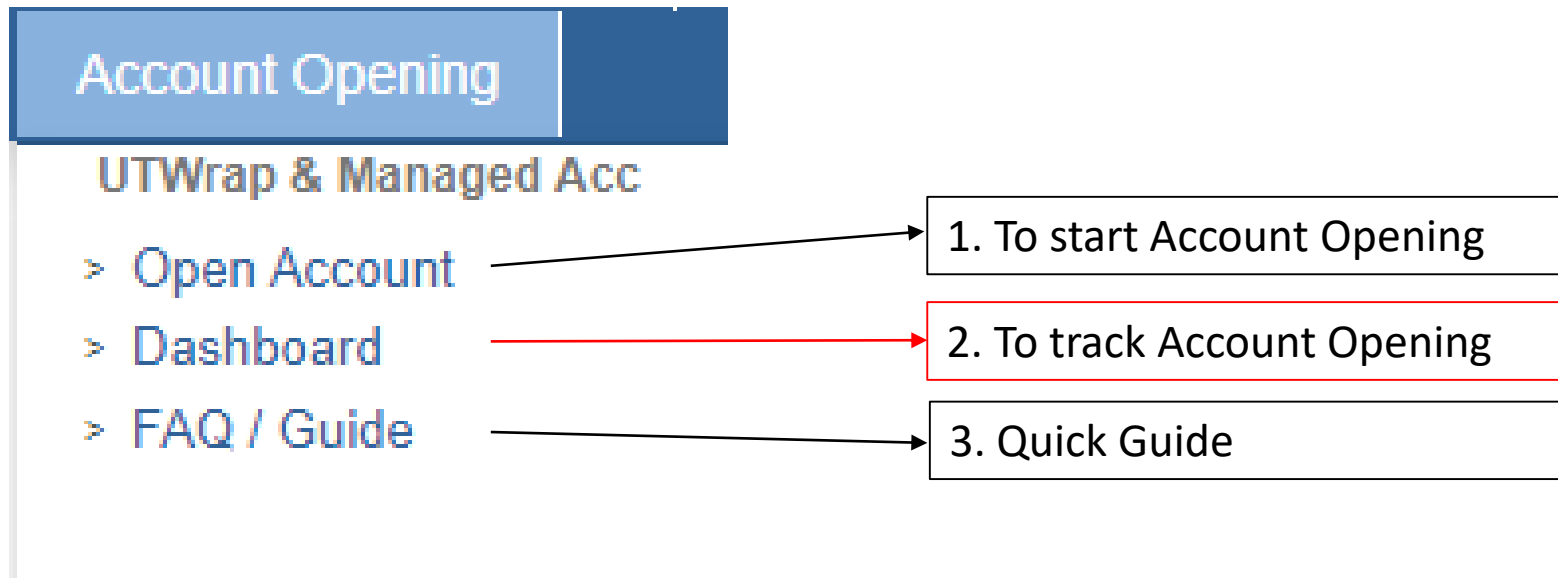
Account Opening Submissions will be pending FA Firm Admin approval

Email Triggered to Adviser



Password is XXXXYYYYZZZZ
where XXXX=FA NRIC last 4
characters YYYY=Client
NRIC last 4 characters
ZZZZ= FA Rep Birth Year

2. Adviser Dashboard



Tracking Submissions

B2B Submitted From

Selected Filter: Quick Search: All fields

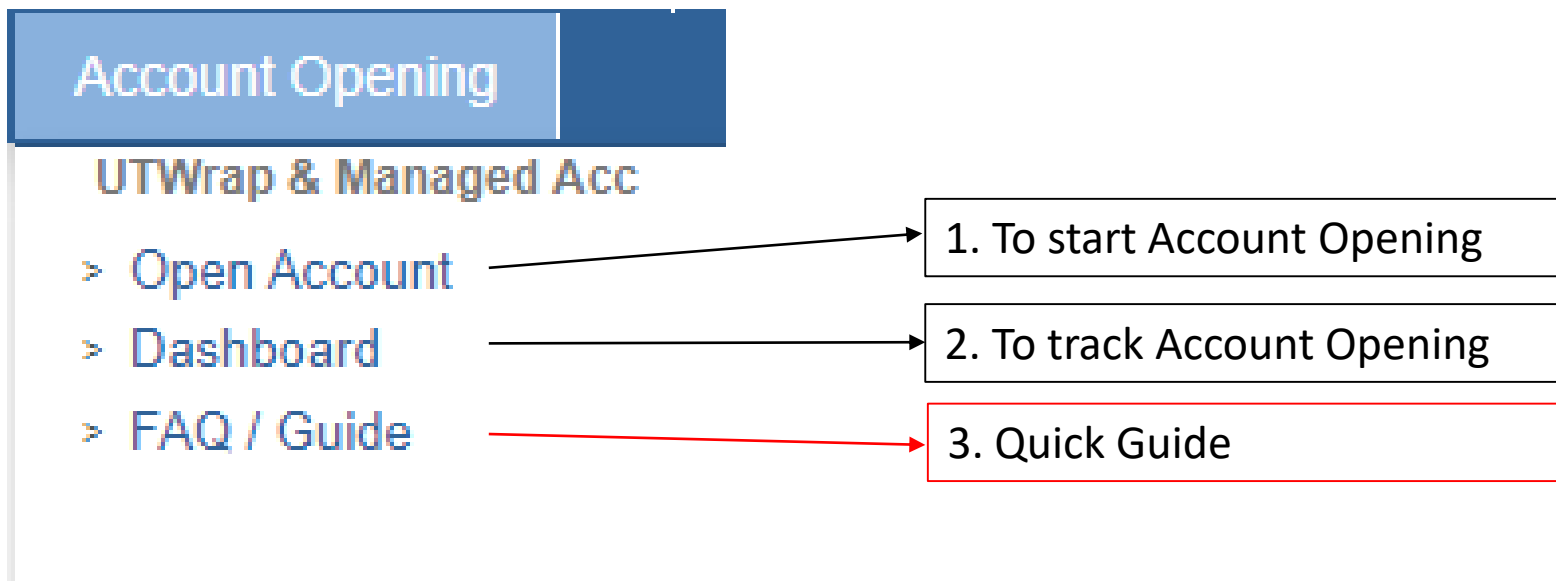
CLIENT NAME	NRIC/PASSPORT NUMBER	FAR NAME	ACCOUNT TYPE	WRAP FEE	SUBMITTED DATE TIME	SUBMITTED BY	SUBMIT STATUS	APPROVAL STATUS
<input type="checkbox"/> MR MYINFO A	S6005051A E35463874W	TAN***	UTW Cash UTW OA UTW SA UTW SRS	(30) AndrewTest 1.5% (30) AndrewTest 1.5% (31) AndrewTest 0.4% (31) AndrewTest 0.4%	11/23/2021	MR MYINFO A	Account Created	Pending for Firm Admin

<< < 1 > >>

Export Info View

Advisers can track submissions they have done
Can view attachments and client info if PDF email is lost

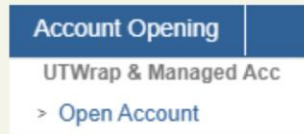
3. FAQ / Guide



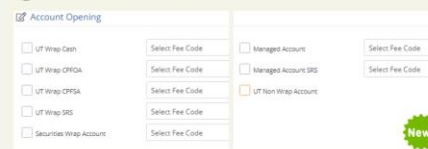
FAME ONLINE ACCOUNT OPENING

FINANCIAL ACCESS MADE EASY

① Login as Adviser, Click the "Open Account" in FAME



② Choose account types, fees or services to be opened.



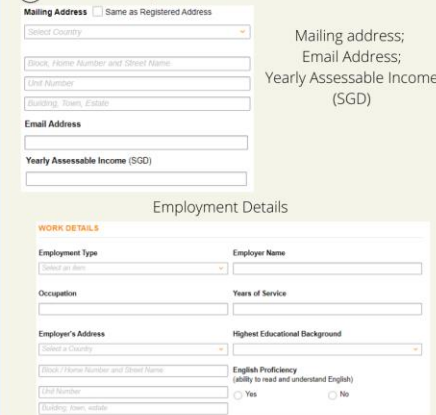
③ Login using MyInfo or Manual



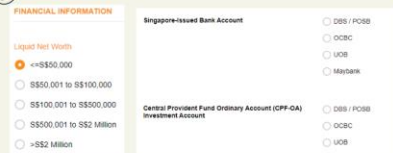
Client recommended to use SingPass for sign up, scan the QR code shown

Personal information will be auto-generated, proceed to check and fill in the remaining.

④ Complete Personal Particulars

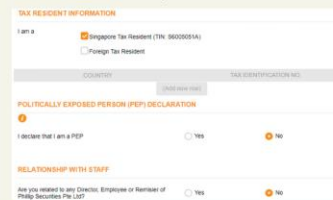


⑤ Financial Details



Client must provide CPF / SRS bank details respective to the account type(s) chosen in step 2

⑥ Tax Residency and Declarations

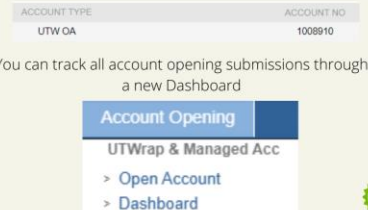


⑦ Terms and Conditions, Signature



- Accept Terms and Conditions,
- Accept Client Acknowledgement
- Either Upload a picture of signature OR
- Key in client's name as per NRIC

⑧ Account Number Generated



FA Firm Admin Approval

Once FA Firm Admin has done necessary checks, they can approve account opening submissions

FA Firm can review submissions and approve/reject

B2B Submitted Form

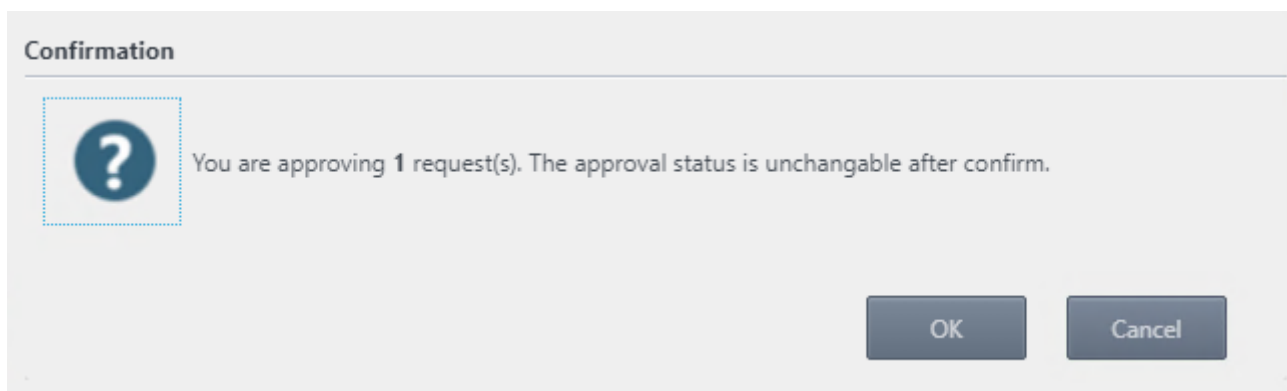
Selected Filter: Quick Search: All fields

	CLIENT NAME	NRIC/PASSPORT NUMBER	FAR NAME	ACCOUNT TYPE	WRAP FEE	SUBMITTED DATE TIME	SUBMITTED BY	SUBMIT STATUS	APPROVAL STATUS
<input type="checkbox"/>	MR MYINFO A	S6005051A E35463874W	TAN***	UTW Cash UTW OA UTW SA UTW SRS	(30) AndrewTest 1.5% (30) AndrewTest 1.5% (31) AndrewTest 0.4% (31) AndrewTest 0.4%	11/23/2021	MR MYINFO A	Account Created	Pending for Firm Admin

Export Info Approve Reject View

Exports info of all selected submissions in bulk, into excel

Approve/Reject confirmation

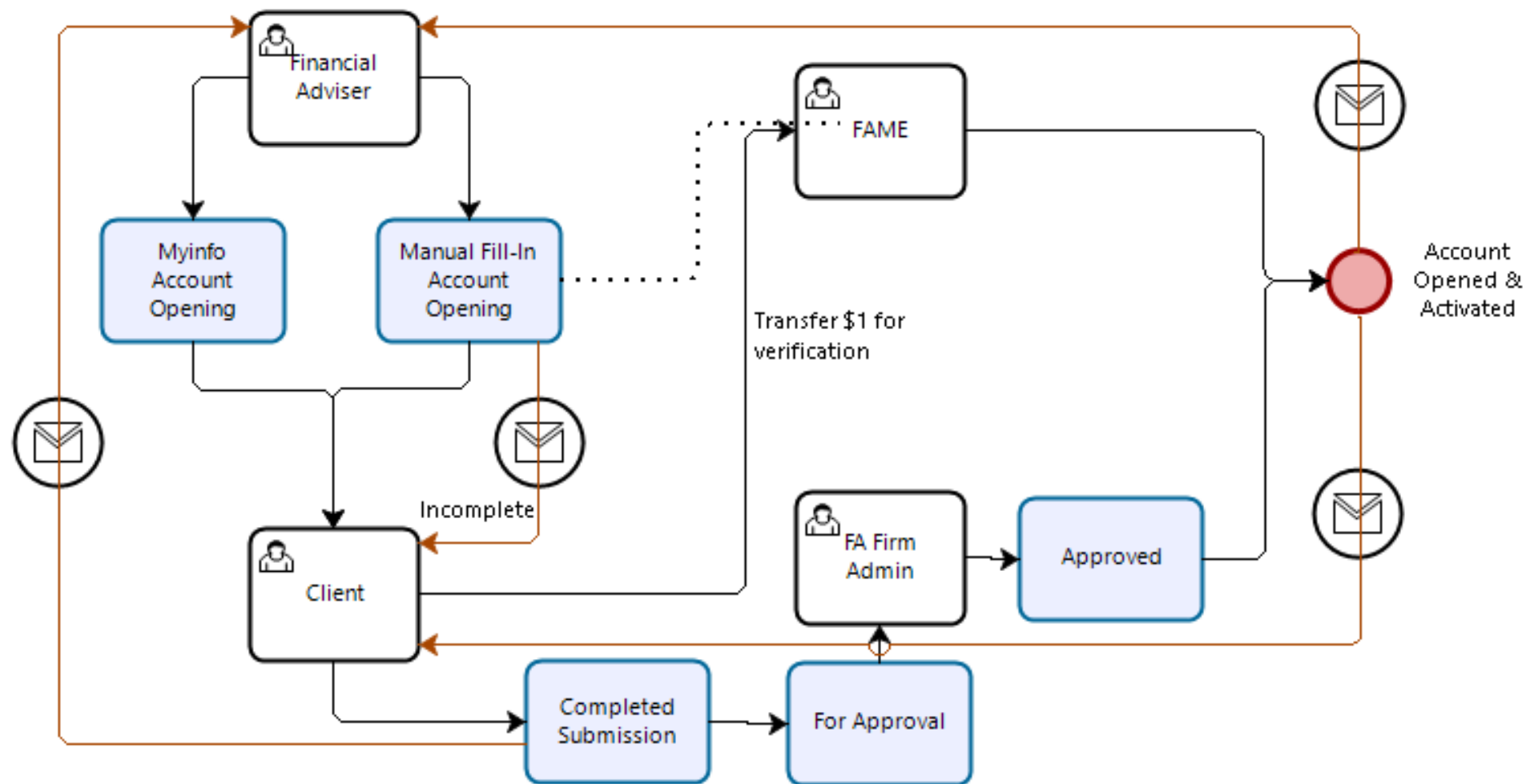


Once confirmed, action is unchangable and submission entries will be removed from admin dashboard

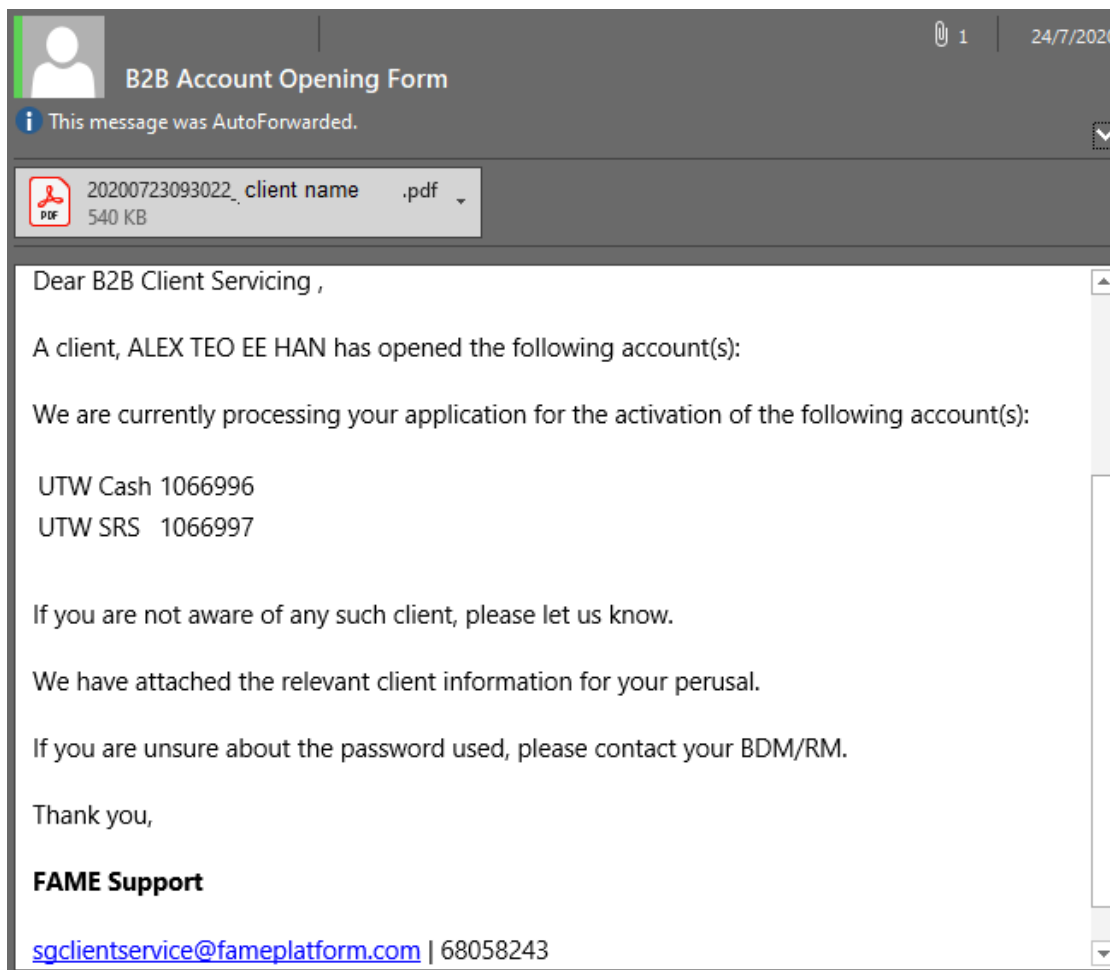
Things to note

- Myinfo Account Opening must be completed in one-sitting. No drafts will be saved for later use
- If submissions have major issues, please request FA Firm admin to reject and re-submit a fresh application

Email Notifications



Myinfo Submission Completed



The screenshot shows an email interface with a header bar containing a profile icon, the subject "B2B Account Opening Form", a paperclip icon with the number "1", and the date "24/7/2020". Below the header, a blue information icon is followed by the text "This message was AutoForwarded." and a dropdown arrow. A PDF attachment is shown with a red icon, the filename "20200723093022_client name .pdf", and a size of "540 KB". The main body of the email contains the following text:

Dear B2B Client Servicing ,

A client, ALEX TEO EE HAN has opened the following account(s):

We are currently processing your application for the activation of the following account(s):

UTW Cash 1066996
UTW SRS 1066997

If you are not aware of any such client, please let us know.

We have attached the relevant client information for your perusal.

If you are unsure about the password used, please contact your BDM/RM.

Thank you,

FAME Support

sgclientservice@fameplatform.com | 68058243

Manual Fill-in Incomplete draft

Dear Alex teo ee han ,

Thank you for your interest in trading/ investing through PhillipCapital.

You are just one step away from embarking on your investment journey.

We have provided a link for your convenience in case you have not completed your application. Please click [here](#).

You will receive an email from us when you have successfully completed your application.

If you require any assistance, please feel free to call us at +65 6531 1555 or send an email to us at talktophillip@phillip.com.sg

We look forward to serving you as Your Partner in Finance.

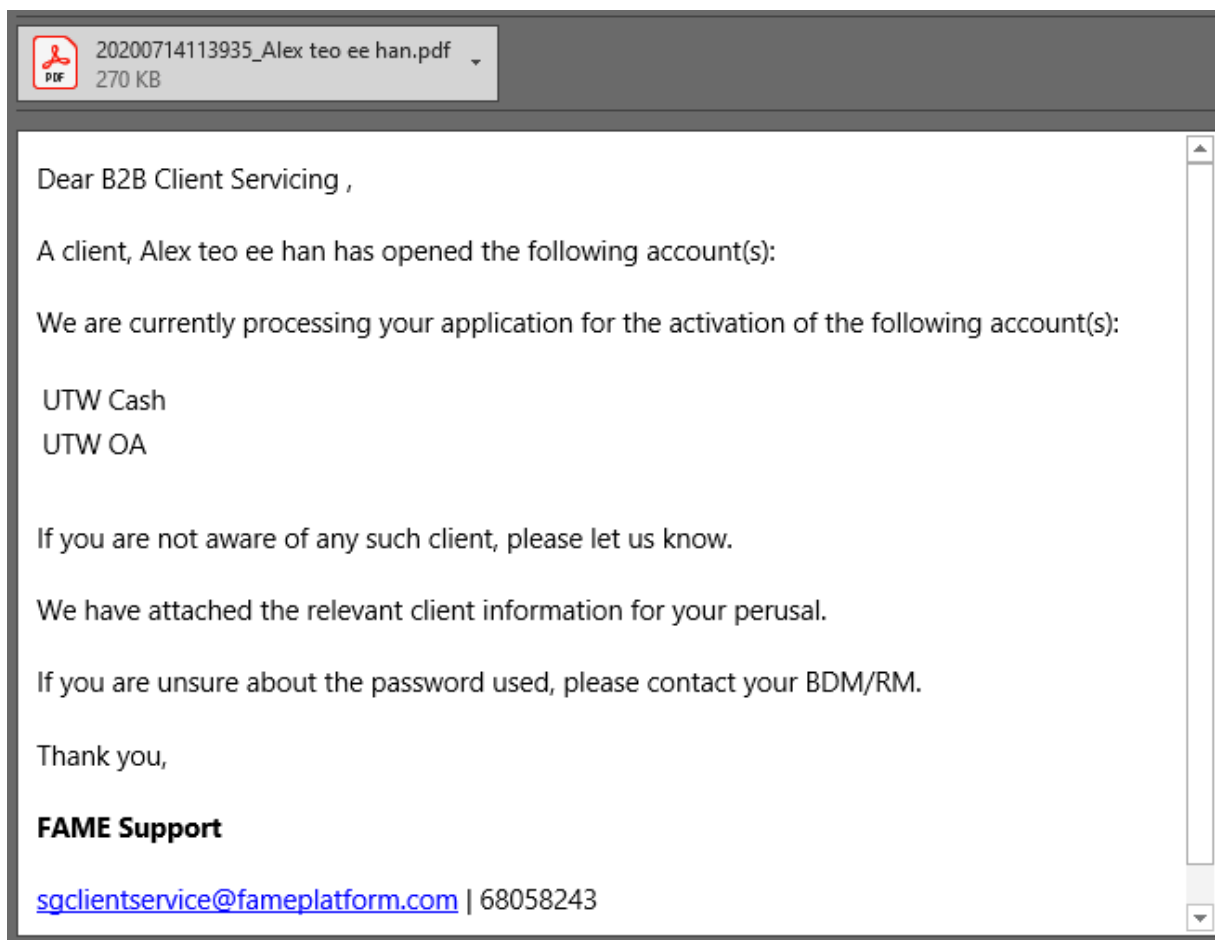
Yours Sincerely,

Customer Experience Team

Phillip Securities Pte Ltd (A member of PhillipCapital)

www.phillip.com.sg

Manual Fill-in Submission Completed



Manual Fill-in \$1 transfer instruction

Dear Alex teo ee han ,

Thank you for your interest in trading/ investing through PhillipCapital.

We have received your online application to open an Account.

To complete your application, please follow these last 1 steps:

Step 1:

1. Log in your internet banking account (DBS/POSB, UOB or OCBC)

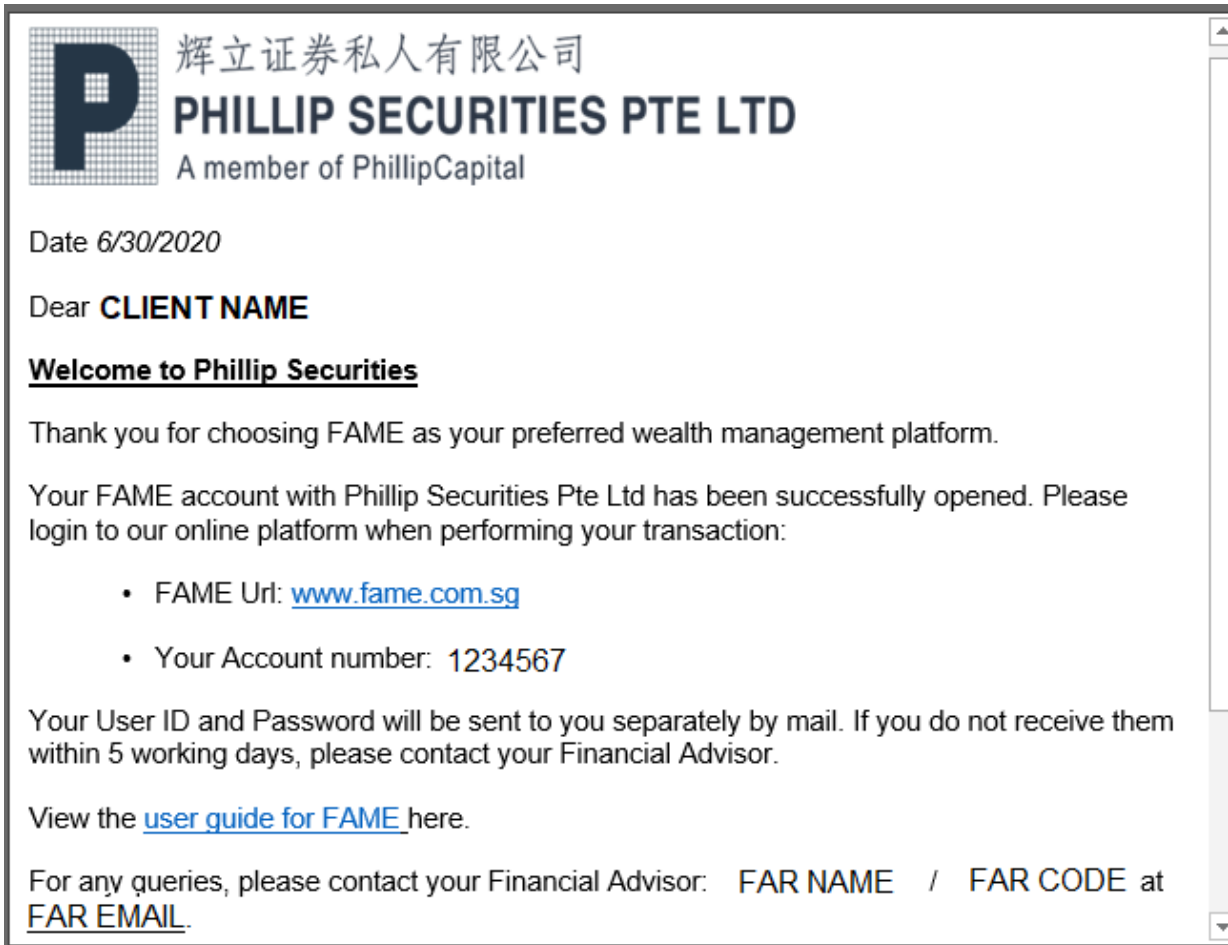
DBS/POSB	Pay Bills > Billing Organization
UOB	Pay Bills > Quick Pay
OCBC	Payments & Transfers > Pay bills > Single Bill Payment


2. Select "bill payment" and select "Phillip Securities Pte Ltd" from the list of Billing Organizations.
3. Input a transfer amount of S\$1 and the 7 digits bill reference number as 0000000.

Fund transferred will be deposited into your Account for investment purposes.

Note: For cancellation or unsuccessful application, an administrative charge of up to S\$1.07 (inclusive of GST) may be levied.

Welcome Email triggered when account is activated



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

Date 6/30/2020

Dear **CLIENT NAME**

Welcome to Phillip Securities

Thank you for choosing FAME as your preferred wealth management platform.

Your FAME account with Phillip Securities Pte Ltd has been successfully opened. Please login to our online platform when performing your transaction:

- FAME Url: www.fame.com.sg
- Your Account number: 1234567

Your User ID and Password will be sent to you separately by mail. If you do not receive them within 5 working days, please contact your Financial Advisor.

View the [user guide for FAME](#) here.

For any queries, please contact your Financial Advisor: **FAR NAME** / **FAR CODE** at **FAR EMAIL**.