



## Update Account Particulars

Joint Account No. \_\_\_\_\_

Please complete one form per account holder, in BLOCK letters and countersign against any amendments.

Kindly take note that only individual account(s) under the account holder will be updated, unless the joint account checkbox above is selected.

### 1 Your Details

Title  Dr  Mdm  Mr  Mrs  Ms

Name (as in PSPL Records) \_\_\_\_\_

NRIC / Malaysian IC / Passport Number (as in PSPL records) \_\_\_\_\_ Date of Birth  /  /   
D D M M Y Y

Email (as in PSPL Records) \_\_\_\_\_

Handphone + (  ) \_\_\_\_\_ (Mobile)

### 2 What would like to update? (Only fill in the fields which you would like to update)

Please submit with supporting documents. Refer to Section 5 for required documents.

Name (as per NRIC / Passport) \_\_\_\_\_ (Maximum 60 Characters)

NRIC / Malaysian IC / Passport Number \_\_\_\_\_ Country of Citizenship \_\_\_\_\_  Singapore PR

If Passport is provided as supporting document, Passport Expiry  /  /  Passport Country of Issue \_\_\_\_\_  
D D M M Y Y

Contact Number + (  ) \_\_\_\_\_ (Mobile) + (  ) \_\_\_\_\_ (Home)

Email Address \_\_\_\_\_

Residential Address (as per Singapore / Malaysian IC) \_\_\_\_\_ Postal Code \_\_\_\_\_

Mailing Address (Complete only if Mailing Address is different from Residential Address) \_\_\_\_\_ Postal Code \_\_\_\_\_

### 3 Tax Residency (Mandatory). Please complete the following table indicating ALL Countries where you are a tax resident:

\*All U.S. persons must provide a completed [Form W-9](#), with instruction available [here](#).

\*Considered no longer U.S. persons must provide 1) Form W-8BEN; and 2) Copy of Certificate of Loss of Nationality of the U.S.; and 3) New Identification Document

Reason A: I am resident of a country/jurisdiction which does not issue TIN to its residents.

Reason B: I am otherwise unable to obtain TIN or equivalent number. (Please explain why you are unable to obtain a TIN if you have selected this reason.)

Reason C: TIN is not required (to be selected only if domestic law of relevant country/jurisdiction of tax residence indicated above does not require the collection of the TIN issued by such country or jurisdiction.)

	Country	TIN or equivalent	If no TIN available Indicate Reason A,B,C	Explanation if Reason B is indicated
Tax Residency 1:				
Tax Residency 2:				
Tax Residency 3:				

### 4 Terms and Conditions

I/We hereby authorize and consent to the update of the above information, including the email address and handphone information in part (1) above, to applicable PSPL accounts. I/We have read and understood the important information stated in Section 6.

Signature \_\_\_\_\_

Name \_\_\_\_\_

/  /   
D D M M Y Y

## 5 Supporting Documents Required

To Update	Supporting Documents Required		
	Singaporean / Singapore PR	Malaysian	Other Nationality
<b>Name</b>	(i) Singapore NRIC; <b>and</b> (ii) Deed Poll (or equivalent)	(i) Malaysian IC; <b>and</b> (ii) Deed Poll (or equivalent)	(i) Passport (passport number remains unchanged); <b>and</b> (ii) Deed Poll (or equivalent)
<b>IC / Passport Number</b>	N.A	Malaysian IC (both new and old)	Passport (both new and old)
<b>FIN</b>	N.A	Work Pass (both new and old)	Work Pass (both new and old)
<b>Country of Citizenship</b>	Singapore NRIC	Malaysian IC or (i) Passport (both new and old); <b>and</b> (ii) Renunciation letter	(i) Passport (both new and old); <b>and</b> (ii) Renunciation letter
<b>Residential Address</b>	Singapore NRIC	Any <b>one</b> of the following documents below that contains the name and address for update: (a) Malaysia IC (b) Statement dated within last 3 months from Government body (e.g. CPF / IRAS) (c) Bank statement dated within last 3 months from any Monetary Authority of Singapore (MAS) licensed banks (d) Proof of PO Box ownership	Any <b>one</b> of the following documents below that contains the name and address for update: (a) Passport (b) Statement dated within last 3 months from Government body (e.g. CPF / IRAS) (c) Bank statement dated within last 3 months from any Monetary Authority of Singapore (MAS) licensed banks (d) Proof of PO Box ownership
<b>Mailing Address</b>	Any <b>one</b> of the following documents below that contains the name and address for update: (a) Singapore NRIC (b) Statement dated within last 3 months from Government body (e.g. CPF / IRAS) (c) Bank statement dated within last 3 months from any Monetary Authority of Singapore (MAS) licensed banks (d) Proof of PO Box ownership		
<b>Singapore PR Status</b>	(i) Singapore NRIC; <b>and</b> (ii) Passport		
<b>Tax Residency</b>	Any <b>one</b> of the following documents: (i) Valid government issued ID (e.g. Driver's license, Employment Pass/Visa, Student Pass); Or (ii) Document from government agencies (e.g. Tax assessment, Employment visa). If you have any questions about this form or your entity's classification status, please visit <a href="http://www.oecd.org/tax/automatic-exchange/common-reporting-standard/">http://www.oecd.org/tax/automatic-exchange/common-reporting-standard/</a> or consult your tax advisor.		

## 6 Important Information

- If any information (including any self-certification) changes or becomes invalid, incorrect, inaccurate and/or unreliable ("Change") in any way, I shall promptly inform PSPL in writing within 30 days from the date I had knowledge of the Change and undertake to provide PSPL with such information, certification, documents or evidence that PSPL may require in connection with such Change.
- Documents not in English must be translated.
  - Translations provided by the embassy of the country that issued the document
  - Translations produced by a notary public in Singapore or the country that issued the document
  - Privately created translations attested by the embassy of the country that issued the document or notarized by a notary public in Singapore or the country that issued the document.
- To update your records with The Central Depository Pte Ltd (CDP), kindly submit [CDP Update of Account Particulars Form](#) or update online through [CDP Investor Portal](#) with your Singpass.

## 7 What happens next?



### Email to PSPL

Email the completed form to [formsubmission@phillip.com.sg](mailto:formsubmission@phillip.com.sg). Please state "Update Account Particulars Form" in the email subject title.



### Mail to PSPL

Phillip Securities Pte Ltd  
250 North Bridge Road  
#06-00 RAFFLES CITY TOWER  
SINGAPORE 179101



Pass it to your designated Financial Advisory Representative (FAR) / Trading Representative