



Please...

- ✓ Refer to the latest version of the Terms of Service from the Client Agreement of Manulife IM (Singapore) 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.
- ✓ Submit this form via email to SGP_iFUNDS@manulifeam.com
- ✓ 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

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 Immigration
and Customs Authority) _____

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 _____

Update of Address

New Residential Address _____

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 except USA
- Mobile number to another country except USA

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 <http://www.oecd.org/tax/automatic-exchange/crs-implementation-and-assistance> 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**.

Tax Identification Number (TIN) _____

Please complete Section 3C (if required) and D

I am a tax resident of **other county(ies)/ jurisdiction(s)**.

Tax Identification Number (TIN) _____

Please complete Section 3B, C (if required) and D

B. Details of foreign tax residency(ies)

Please provide ALL the country(ies) (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 (Policyowner) is liable to pay tax does not issue TINs to its residents.
- B. The Account Holder (Policyowner) 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) other than the one(s) that I have declared above. I also agree to provide assistance to Manulife for it to comply with relevant tax regulations.

4. Consent to Communication from Manulife

Manulife Investment Management (Singapore) Pte. Ltd. (including Manulife group of companies and their service providers) may, from time to time, contact you to provide information on exclusive offers such as vouchers or discount, or inform of new products and/or services. We will do so via email, SMS, call, or other forms of communications. Please let us know if you would like to receive such communications.

- Email
- SMS
- Voice call
- Mail/ Other forms of communication

Please note that this consent will supersede any consent provided to Manulife Investment Management (Singapore) Pte. Ltd. (including Manulife group of companies and their service providers) previously.

5. Declaration and Authorisation by Account Holder

Update of Personal Details

1. I agree that the personal data collected in this form will be used by Manulife Investment Management (Singapore) Pte. Ltd. ("Manulife IM") for the purpose of complying with my correction/update request and other related purposes only.
2. I confirm that the above information is true and correct, and I authorise Manulife IM to effect the correction(s)/update(s) requested on my iFUNDS account.
3. I further confirm that I have read and understood and hereby consent to the collection, use disclosure and processing of my personal data in accordance with and agree to be bound by Manulife Statement of Personal Data Protection, as may be amended by Manulife from time to time. I have obtained a copy of the Manulife Statement of Personal Data Protection by
(a) downloading a soft copy from www.manulife.com.sg; or
(b) obtaining a hard copy from Manulife.

CRS Declaration

Please note that the Singapore Income Tax Act (Chapter 134) imposes a penalty of a fine not exceeding ² 10,000 and/or imprisonment of up to 2 years, on individual that is known to provide false or misleading information. For more information, please refer to Section 105M of the Singapore Income Tax Act (Chapter 134).

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 in 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 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.

Marketing Consent Withdrawal

1. I understand and agree that with my withdrawal of marketing consent under Part 4:
 - i) I will no longer receive any Marketing Messages via the communication channel(s) as checked above;
 - ii) Manulife IM may continue to send Marketing Messages via the communication channel(s) as checked above within the next 30 days from the date of receipt of this completed form by Manulife IM;
 - iii) Any other marketing consent which I may have previously provided to Manulife IM will be superseded.
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.

Authorised Signature

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

Full Name

Date

Important notes:

1. Only completed forms with original signature will be processed.
2. Please allow up to 7 working days for the process 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 Statement of Personal Data Protection located at our [website](#).