



Account Information Update / Transfer / Closure

Name: _____

IC/Passport/Co. Registration No: _____ Trading Account No(s): _____

1. CHANGE ADDRESS / NAME / IC or PASSPORT NO / NATIONALITY / PERMANENT RESIDENCY STATUS

If your trading account is linked to CDP Securities Account 1681-XXXX-XXXX and as the above changes can only be effected by The Central Depository (CDP), please

- a) complete the enclosed SGX "Update Account Particulars" Form*
- b) attach Supporting Document/s (refer to SGX Form - Supporting Documents required by CDP)
- c) return to CGS-CIMB for our onward transmission to CDP for the update

***You can update address, contact number, and email address by logging into CDP Internet on investors.sgx.com using Singpass Mobile app. No Supporting documents required.**

If your trading account is linked to CDP Sub-Account 2171-XXXX-XXXX, please update the change in Section 8 of this form.

2. CHANGE EMPLOYMENT

Retired

Private Investor

Homemaker

Unemployed

Student

Employed

Self- Employed

Armed Forces Personnel

Name of Company

Job Title
(applicable for Employed Status)

Country of Employment

Annual Income (SGD)

3. CHANGE CONTACT DETAILS

Note: If you are an existing I*trade online account holder with a registered 2FA, you can update your Email and Contact details online.

Email Address: _____ Contact No.: _____
(country code / area code / number)

4. UPDATE DETAILS / CANCEL CPF INVESTMENT or SUPPLEMENTARY RETIREMENT SCHEME ("SRS") ACCOUNT

^Please Circle Bank Name

CPF Investment Account No: (^ DBS / OCBC / UOB) _____

SRS Account No: (^ DBS / OCBC / UOB) _____

I have closed my CPF Investment Account.
Please remove my CPF investment account details from your records.

I have closed my SRS Account.
Please remove my SRS account details from your records.

5. CHANGE TRADING REPRESENTATIVE ("TR")

Existing TR's Name/Code: _____ () TR's Name/Code: _____ ()

Reason for Transfer (mandatory): _____

6. INVALIDATE EXISTING FACILITIES / SERVICES or WITHDRAWAL OF MONIES
Invalidate:

- Electronic Payment for Shares (EPS)
 Letter of Authorisation – Third Party Trading
 E-statement
 Client Investment Profile
 GIRO – CIMB BANK
 For other banks, please request for respective bank's Giro Termination Form

Withdrawal of Monies

- Amount: _____ Currency: _____
 Credit EPS / GIRO Bank Account
 Credit "Direct Credit Service" Bank Account (Please provide a copy of your bank book / bank statement (dated within 3 months))
 Others: _____

7. CLOSE TRADING ACCOUNT

Trading Account No(s): _____

Reason for Closure: _____

Kindly ensure that all outstanding payments and holdings are cleared.

**8. CHANGE ADDRESS / NAME / IC or PASSPORT NO / NATIONALITY / PERMANENT RESIDENCY STATUS
(applicable only for trading accounts linked to CDP Sub Account 2171-XXXX-XXXX)**

 Name*: _____
(copy of new IC/passport/ROC required)

 IC/Passport No*: _____ Nationality*: _____ Singapore PR*: Yes No
(copy of new IC/passport required) (copy of new IC/passport required) (copy of blue NRIC required)

 Residential/Registered Address: _____
(copy of address proof required [e.g. IC, latest bank statement, utility bill, government body letter])

 Mailing Address: _____
(if differs from residential/registered address)
(copy of address proof required [e.g. IC, latest bank statement, utility bill, government body letter])

*Note:

- All original documents are to be duly sighted by CGS-CIMB Securities authorised personnel or Notary Public.
- Supporting documents required for Corporate account – Certificate of Change of name, Latest/Updated registry of Company Information print-out

9. CHANGE/ADD/CLOSE INTRODUCING BROKER ("IB")

- Change from _____ to _____
IB Name IB Code IB Name IB Code
 Add Close _____
IB Name IB Code

DECLARATION

I/We hereby declare, represent, warrant and agree that all information submitted above are true and accurate in all aspects.



Signature of Main Account Holder/Authorised Signatory



Signature of Joint Account Holder/Authorised Signatory

FOR OFFICIAL USE ONLY

Signature witnessed by / verified against existing records:

Checked by (Contracts Department):

 Name of Verifying Officer / Signature / Date

 Name of Staff / Signature / Date