

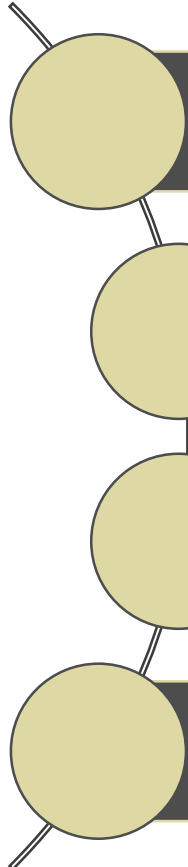


iFAST

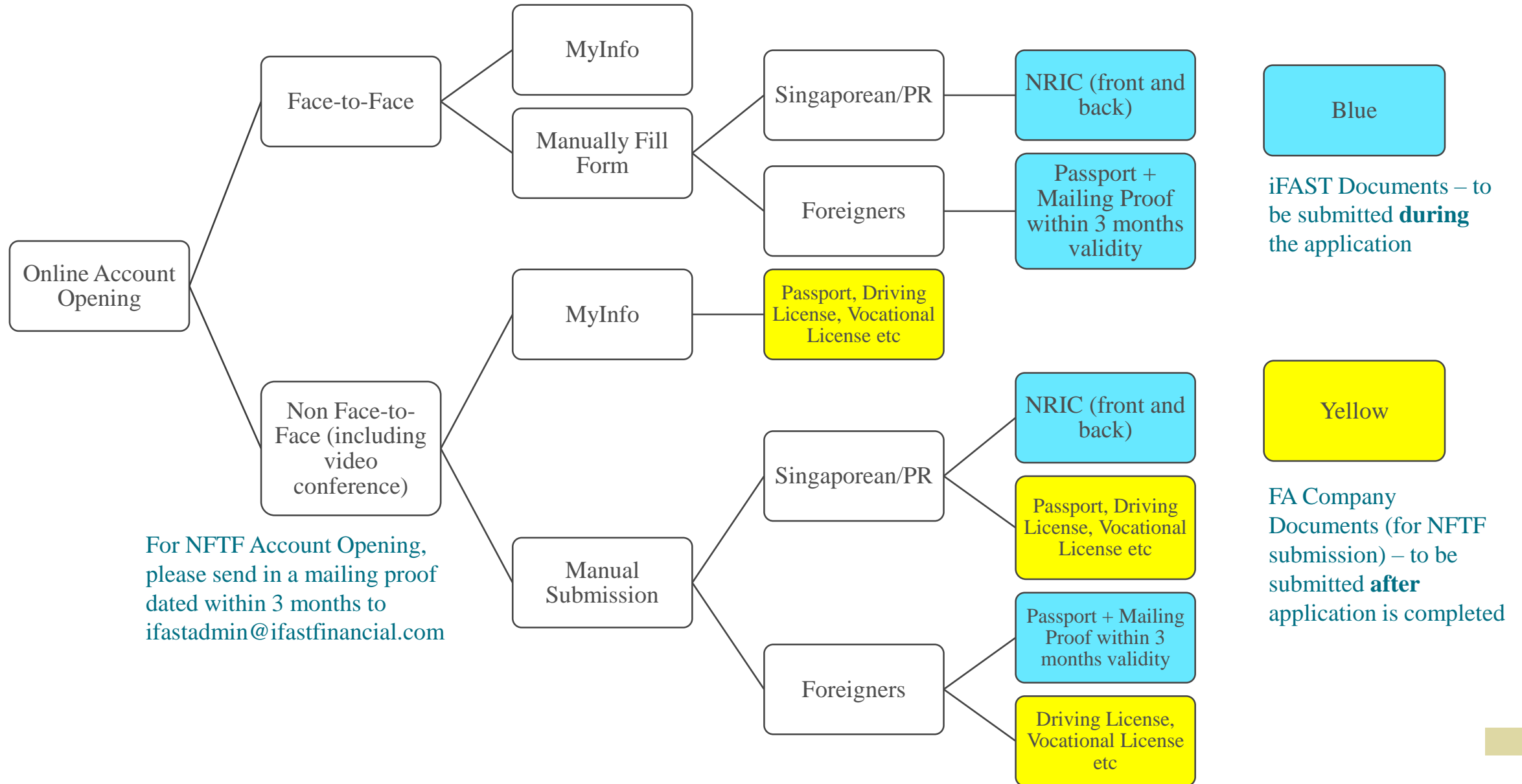
ONLINE ACCOUNT OPENING

July 2021

Why Online Account Opening?

- 
- Save time on manual filling and potential human error
 - Retrieve client's information that is automatically populated via MyInfo within minutes
 - Sit back and enjoy real time updates of the account opening status
 - Submit your online transaction together with account opening

Online Account Opening Process – New Client



Online Account Opening Process – New Client



iFAST Documents – to be submitted during the application



FA Company Documents (for NFTF submission) – to be submitted after application is completed

Upload Account Documents

Main Applicant Identification Document (NRIC - Front and Back/Passport)

- * Please note that files uploaded should not exceed 5MB in size.
- * File name can only consist alphanumeric, '_' and '.' values.
- * Please attach your document(s) in PDF or image format (i.e. .bmp, .jpeg, .jpg, and .png).

NRIC - Front Copy

Click or drag file to this area to upload

Strictly prohibit from uploading company data or other band files

NRIC - Back Copy

Click or drag file to this area to upload

Strictly prohibit from uploading company data or other band files

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Download Supporting Documents

FA Company document

FA Company document

Click or drag file to this area to upload

A maximum of 1 files can be uploaded, and they must be in either PDF, GIF, JPG or JPEG format.
The maximum permissible size for each uploaded file is 5MB.

Cancel

Save

What to follow up with iFAST?

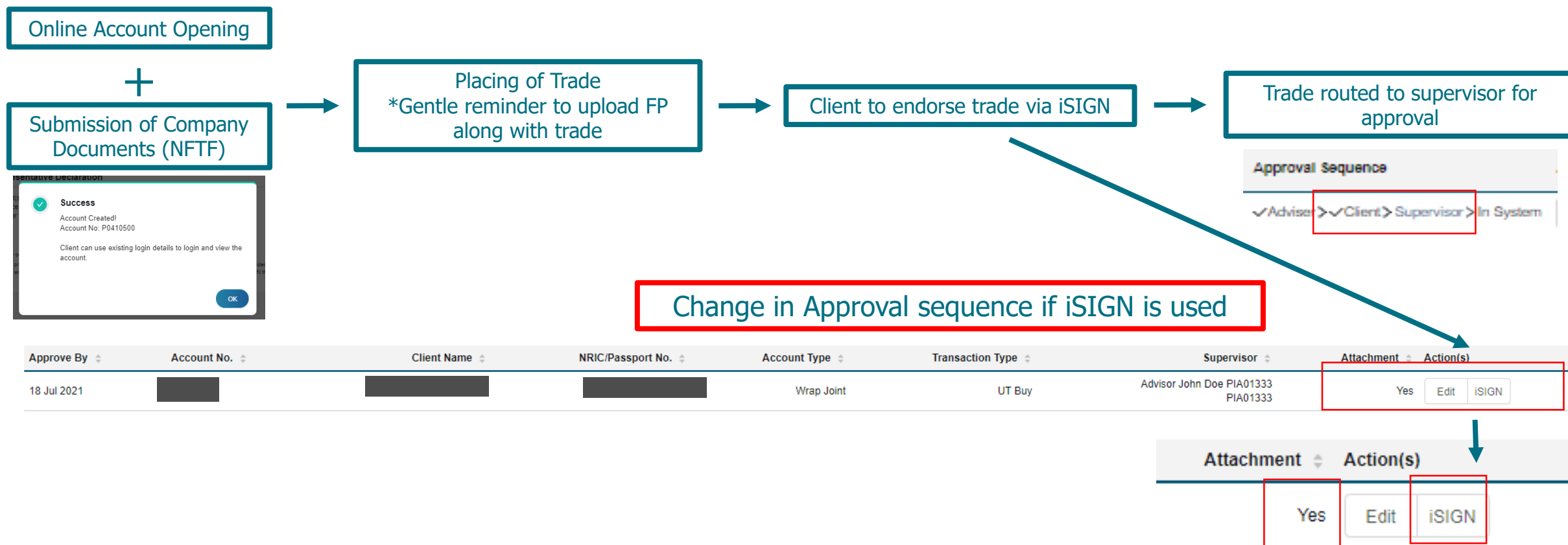
	When is it required?	Supporting Documents
iFAST Non Face to Face verification (video conferencing included)	<p>If “No” is ticked for [Did the client sign in your presence]</p> <div><p>FA Representative Declaration</p><p>Did the client(s) sign off this form in your presence either through video conference or face to face? <input type="radio"/> Yes <input checked="" type="radio"/> No</p><p><input checked="" type="checkbox"/> I hereby confirm and declare that</p><ul style="list-style-type: none">• I have provided the applicant(s) a copy of iFAST Terms and Conditions and Fee Schedule , and I have provided• iFAST with all the applicant(s) identification information and verification documents that are necessary to fulfil the applicable regulatory requirements.</div>	Mailing proof within 3 months validity i.e. credit card/bank statement

Kindly follow up and email documents to ifastadmin@ifastfinancial.com

Online Account Opening + Transaction

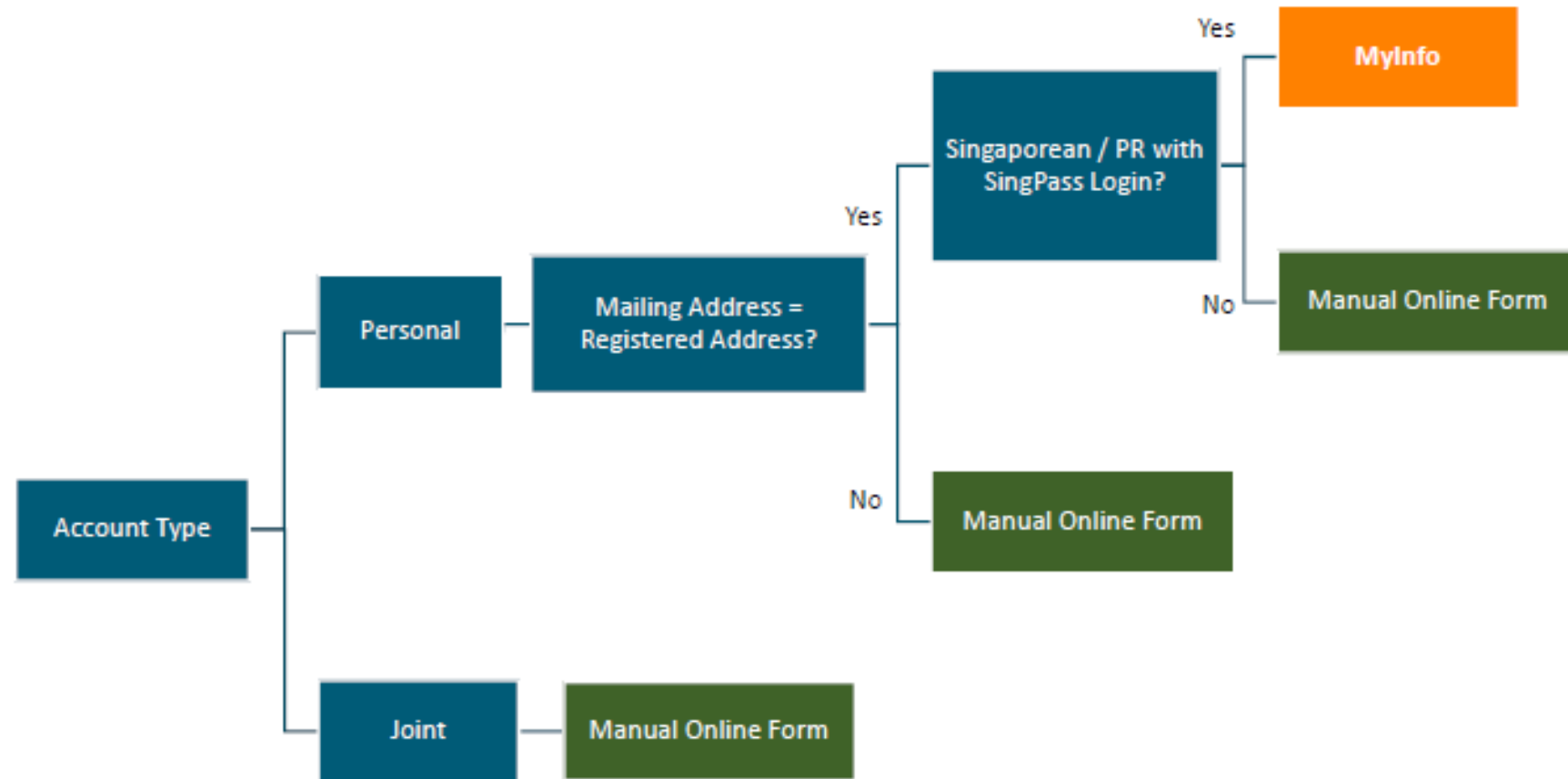
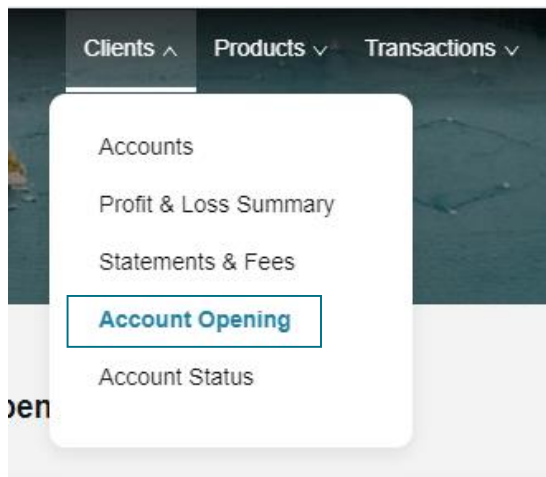
Standard Trade Approval Sequence: Advisor > Supervisor > Client > System

iSIGN Trade Approval Sequence *New*: Advisor > Client > Supervisor > System



Online Acct Opening

- Individuals with U.S citizenship or permanent resident (green card) will not be allowed to open an iFAST Account.



ACCOUNT OPENING for EXISTING CLIENTS

Acct Opening – Existing Client

Account Opening

View Draft

New Client

Existing Client

Select Relevant Account Information
Joh

Select Account Type
Non Wrap Personal

Account Name (Optional)

Next

Note: For existing client, data retrieved will be based on the latest approved account (based on NRIC), provided the account is not suspended

Acct Opening – Existing Client

- Upload the necessary documents on the final page (System will prompt accordingly)

MyInfo

- NRIC Copy is not required
- Supporting document is required if Mailing Address differs from Registered Address

Manually Fill Forms

- Singaporeans/ PR: NRIC Copy, Supporting document is required if Mailing Address differs from Registered Address
- Foreigners: Passport + Supporting Document

Upload Account Documents

Main Applicant Identification Document (NRIC - Front and Back/Passport)

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* File name can only consist alphanumeric, '_' and '-' values.

* Please attach your document(s) in PDF or image format (i.e. .bmp, .jpeg, .jpg, and .png).

NRIC - Front Copy



Click or drag file to this area to upload
Strictly prohibit from uploading company data or other band files

NRIC - Back Copy



Click or drag file to this area to upload
Strictly prohibit from uploading company data or other band files

Acct Opening – Existing Client

- E-signature required to proceed
- Click on the link to review the Risk Disclosure and Risk Warning Statement

Risk Disclosure Statement and Risk Warning Statement

Risk Disclosure Statement Relating to Securities
Customers who trade or transact in Securities through iFAST should be aware of following risk which may be involved in such trading:

Contractual Terms

- The terms as to price, term, expiration dates, restrictions or exercising an option and other terms material to a transaction.
- Any terms describing risk factors, such as volatility, liquidity, etc.
- The circumstances under which you may become obliged to make or take delivery of the underlying interest of a transaction.
- The legal risk surrounding the transaction, including but not limited to the circumstances under which the transaction may be illegal, resulting in it being void and unenforceable.

Market Forces

- Your payments or receipts under a transaction will be linked to changes in the particular financial market or markets which the transaction is linked, and you will be exposed to price, currency exchange, interest rate or other volatility in that market or markets. You may sustain substantial losses on the contract, trade, product or financial investment if the market conditions move against your positions. It is in your interest to fully understand the impact of market movements, in particular the extent of profit/loss you would be exposed to when there is an upward or downward movement in the relevant rates, and the extent of loss if you have to liquidate a position if market conditions move against you. Your position may be liquidated at a loss, and you will be liable for any resulting deficit in your Account with iFAST.
- The price and value of any investment in securities and the income, if any, from them, can fluctuate and may fall against your interest. An individual security may experience downward price movements and may under some circumstance even become valueless. An inherent risk of trading Securities is that losses may be incurred, rather than profits made, as a result of buying and

OK

- Beneficial Owner
- Personal Details
- Contact Details
- Employment
- Additional Due Diligence
- Upload Document

Main Applicant **Beneficial Owner**

Beneficial Owner

Do you have any beneficial owner(s)? If your answer is "Yes", please complete the Anti-Money Laundering Declaration form. **No**

Main Applicant's Signature



Clear

Risk Disclosure Statement and Risk Warning Statement

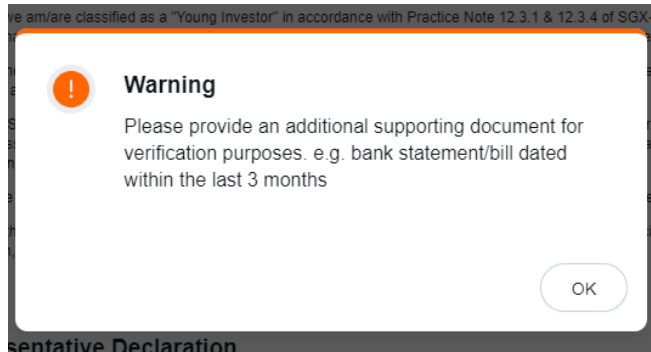
You MUST READ the [Risk Disclosure Statement Relating to Securities and Risk Warning Statement for Overseas-Listed Investment Products Declaration](#).

How to sign off digitally?

- F2F: on tablet/iPad screen
- Non F2F: Adviser to pass "Remote Control" to client

Acct Opening – Existing Client

- Check the box for all the declarations required
- System will prompt if its 'No' to signing off in the presence of the FA Rep.
- Additional Supporting Document will need to be emailed to iFAST for Account to be approved



Applicant(s) Declaration

- ☒ I/We hereby declare and warrant that the information given in this form submitted to you are complete, true and accurate and that I/we have not wilfully withheld any material fact/information. I/We shall give iFAST Financial Pte Ltd ("iFAST") written notice of any change in my/our particulars. By disclosing my/our personal data, I/we consent to iFAST collecting, using and/or disclosing my/our personal data for the purposes of administering my/our Investment(s) and Investment Account(s). I/We also consent to iFAST transferring my/our personal data to iFAST related group of companies and/or third party service providers, suppliers, agents, distributors, fund managers, intermediaries, or relevant stock exchanges for the above purposes. I/We declare that I/we am/are not undischarged bankrupt(s), have not committed any act of bankruptcy within the past 12 months and no bankruptcy order has been made against me/us or is/are pending against me/us during that period. I/We acknowledge that I/we am/are responsible for my/our own tax affairs and declare that I/we have not committed or been convicted of any tax crimes. I/We hereby consent the Representative and iFAST obtaining information immediately from me/us upon reasonable request for the purpose of Representative's and iFAST's compliance with the Notices and Guidelines on Prevention of Money Laundering and Countering the Financing of Terrorism. If any information is found false or misleading, iFAST may reject any of my/our application and/or instructions including but not limited to, any transactional-related activities. I/We understand that I/we can, at any time, request for advice from my/our financial adviser representative concerning a Specified Investment Product.
- I/We agree and acknowledge that the value of the Investment(s) may go up and down and by instructing iFAST to apply for any Investment(s) on my/our behalf, this risk which I/we am/are prepared to accept. I/We hereby irrevocably hold iFAST harmless (or "indemnify iFAST") from and against all losses, damages, costs and expenses whatsoever legal or otherwise, which I/we may sustain, suffer or incur as a result of the performance of any investment(s) and currency conversion connected with any transaction for the Account. I/We confirm that I/we have received, read, understood and agreed to be bound by this Application Form, the relevant Investment Account [Terms and Conditions](#), [Fee Schedule](#), product prospectus, product highlight sheets and [Important Notes for Transacting of Securities](#).
- Where I/we am/are classified as a "Young Investor" in accordance with Practice Note 12.3.1 & 12.3.4 of SGX-ST Rules (individuals above the age of 18 and below age of 21 years), I/we hereby confirm that the risks and uncertainties associated with trading or investing in securities have been properly explained to me/us and that I/we have an appropriate understanding of such risks.
- I/We acknowledge that I/we have received, read, understood and agree to the Risk Disclosure Statement relating to Securities and Risk Warning Statement for Overseas-Listed Investment Products and that the declarations are applicable to all my/our accounts.
- For CPFIS Investment: I declare that I have (1) opened a CPF Investment Account before; (2) invested under the CPF Investment Scheme - Special Account before; and/or (3) completed the Self-Awareness Questionnaire. If the above declaration is found to be false, I understand and agree that CPF Board will reject the withdrawal of monies from my Ordinary or Special account, as the Board thinks fit.
- Corporate account transactions: By approving, the above declarations would have deemed to be made by the authorised signatories on behalf of the entity/body/business.
- Unless otherwise disclosed in writing, I/We hereby declare and warrant that I/We am/are the ultimate Beneficial Owner of this account and that no person other than myself have or will have any interest in, influence or control over this account, whatsoever.

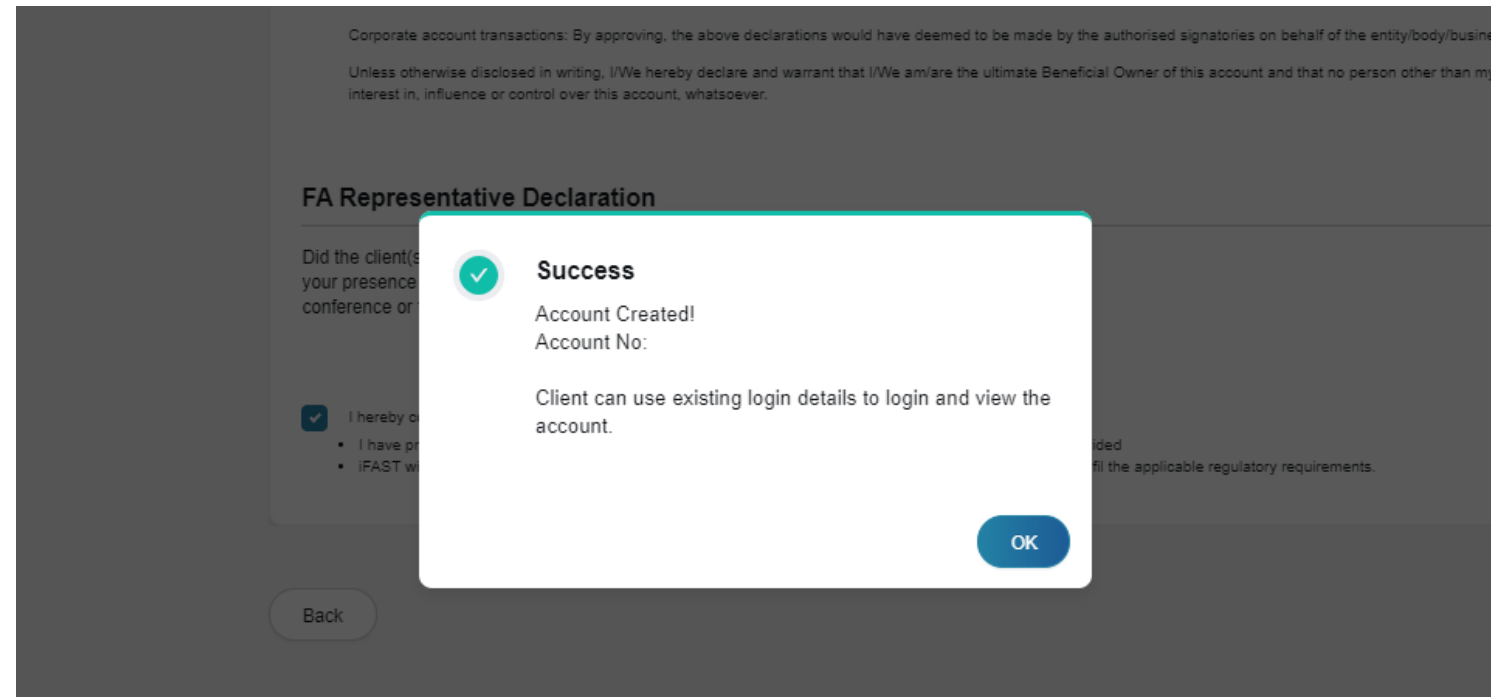
FA Representative Declaration

Did the client(s) sign off this form in your presence either through video conference or face to face? ☐ Yes ☒ No

- ☒ I hereby confirm and declare that
- I have provided the applicant(s) a copy of iFAST Terms and Conditions and Fee Schedule, and I have provided
 - iFAST with all the applicant(s) identification information and verification documents that are necessary to fulfil the applicable regulatory requirements.

Existing Client – Account Created Successfully

- Adviser will be able to input Buy Trade with the Account Number given, and client to endorse the trade via iSIGN as well.
- But take note that Account status is still in 'Pending Approval'
- Trades will only be routed to Supervisor for approval after account has been approved by Company and iFAST.



ACCOUNT OPENING for NEW CLIENTS

Acct Opening – New Client

View Draft - Forms that are incomplete and saved in system (Valid for 30 Days)

Clients / Account Opening

Account Opening

[View Draft](#)

☒ New Client ☐ Existing Client

Warning

Please note that according to the Foreign Account Tax Compliance Act ('FATCA'), certain information you provide may require you to complete an additional online questionnaire. In addition, the Company will not accept applicants who have the following U.S. person indicia:

1. U.S. citizenship or U.S. permanent resident (green card) status
2. A U.S. residence and/or mailing address
3. A U.S. Taxpayer Identification Number (TIN)

ARE YOU A U.S. CITIZEN, PERMANENT RESIDENT OR HOLDS A U.S. TAXPAYER IDENTIFICATION NUMBER?

☐ Yes ☒ No

Select Account Type

Wrap Personal

Non Wrap Personal

Non Wrap Joint

Wrap Personal

Wrap Joint

Account Name (Optional)

Open Your Account With MyInfo
For SingPass Holders

MyInfo

No supporting documents required. e.g. NRIC. For Singaporeans and PRs with SingPass login access.

The account opening form will be filled with your personal data from MyInfo automatically, making your application process fast and convenient. You will be eligible for instant account approval if all your details are declared accurately and completed by MyInfo.

If your registered and mailing addresses differ, please select 'Manually fill form' option.

[Learn more about MyInfo](#)

[Proceed With MyInfo](#)

Manually Fill Form

For those who prefer to complete their application manually. The online application process will take about 5 minutes. Supporting documents required:

Singapore Citizen/PR

1. Clear copy of NRIC (front & back)
2. Proof of mailing address dated within the last 3 months (if it differs from the NRIC)

OR

Foreigner

1. Clear copy of valid Passport
2. Proof of registered address dated within the last 3 months
3. Proof of mailing address dated within the last 3 months (if it differs from the Registered Address)

[Proceed With Manually Fill Form](#)

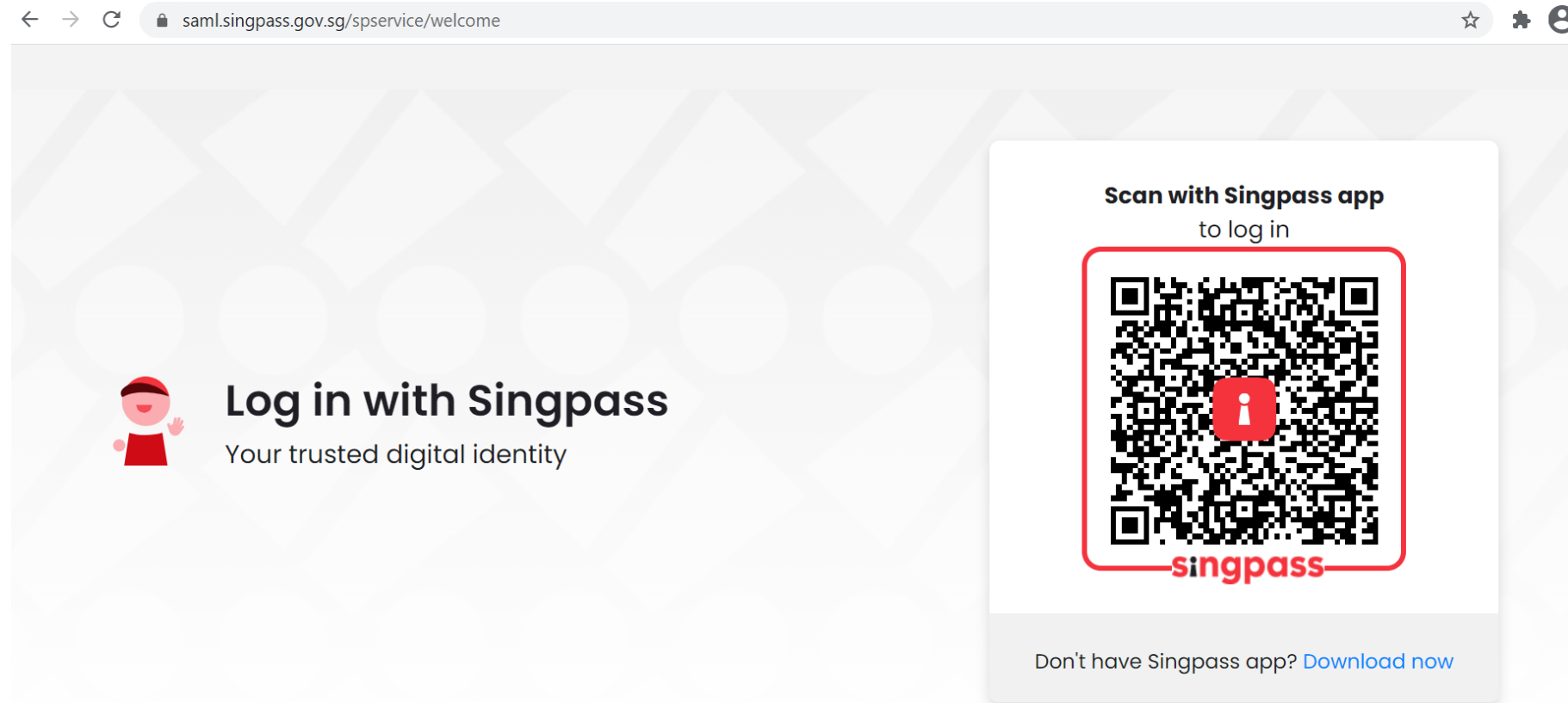
OPTION 1 – for Singaporeans & PRs with SingPass Login Access (Personal Accounts Only)

OPTION 2 – Input the details manually (Personal & Joint Accounts)

Account Type Available

New Client - MyInfo

- Scan QR code using SingPass Mobile to enable information to be retrieved via MyInfo



New Client - MyInfo

- Details are automatically retrieved
- Verified data from MyInfo is non-editable (grey off) while non-verified data is editable
- Client is still required to fill in other mandatory fields which is not retrieved from MyInfo to proceed

Personal Information

Fee Structure

Confirmation

1

2

3

1 Personal Details

2 Contact Details

3 Bank Details

4 CPF & SRS

5 Employment

6 Additional Due Diligence

Main Applicant's Details

Nationality

Singapore

Country of Birth

Singapore

Type of Identification

NRIC (For Singaporean/PR/Malaysian...)

NRIC No. (For Singaporean/PR/Malaysian only)

S1234567A

Country of Issue (NRIC/Passport)

Singapore

Salutation

Mr.

Full Name as in NRIC/Passport

S [REDACTED]

Hanyupinyin Name

Date of Birth

06 / 12 / 1989

Gender

Male

Race

Chinese


Account Name (Optional)

Tax Residence Details

New Client - MyInfo

- Client required to verify their mobile number via OTP

Main Applicant's Contact Details ⓘ

Email	
<div></div>	
Country Code	Mobile No.
<div> Singapore (+65) ▼</div>	<div><div></div><div>✓</div></div>
<div>Verify Mobile Number</div>	

☐ Please tick if it is a U.S. number

New Client – MyInfo/ Manually Fill Forms


- In the event if Mailing Address is different from Registered Address, additional supporting document will be required to be uploaded.

Registered Residential Address

Note(s)

(P.O.Box, V Box and C/O addresses are not allowed. Name AND address indicated must be the same as name AND address on the Identification Card for Singaporeans/Singapore Permanent Residents/Malaysians, and proof of address for other nationalities.)

- Singaporeans/Singapore Permanent Residents/Malaysians: A copy of your Identification Card (front and back).
- Other nationalities: A copy of your valid Passport AND proof of address (e.g. bank statement/utilities/telephone/internet service bill), dated within 3 months from date of receipt.

Country
 Singapore

Postal Code (Fill in NA if do not have postal code)
 049315

Floor Unit
 # 26 - 01

[GET ADDRESS](#)

Please fill in your Floor Unit and Postal Code and click on Get Address button. [Click here](#), if you do not know your postal code.

Address Line 1
 10 COLLYER QUAY

Address Line 2
 #26, OCEAN FINANCIAL CENTRE

Mailing Address

- ☐ Same as Registered Residential Address of Main Applicant
- ☒ Different from Registered Residential Address of Main Applicant. Please indicate the address below, tick the reason and attach a supporting document e.g. bank statement/bill dated within the last 3 month

Reason for different mailing address from your residential address:

Select one

Country

Postal Code (Fill in NA if do not have postal code)

State

Address Line 1

Address Line 2

New Client – MyInfo/ Manually Fill Forms

- Input Client's Bank Account details to credit all cash outflows directly to the indicated Bank Account.
- CPF Investment Details and SRS Details will be required if there are CPF/ SRS trades to be submitted
- Click Next to proceed if client does not have the information at the point of account opening

The screenshot displays the 'Main Applicant's Direct Credit Bank Account Details' form. On the left, a progress bar shows six steps: Personal Details (checked), Contact Details (checked), Bank Details (active), CPF & SRS, Employment, and Additional Due Diligence. The main content area is titled 'Main Applicant's Direct Credit Bank Account Details' and includes a grey box with the heading 'Get quicker access to cash with our direct crediting service' and four numbered points explaining the service. Below this, there is a section 'Please credit all cash outflows directly to my bank account' with radio buttons for 'Yes' (selected) and 'No'. Further down, there are two dropdown menus: 'SGD Bank Account' with the placeholder 'Select Name of Bank' and 'USD Bank Account' with the placeholder 'Select Your USD Bank Account Type'. At the bottom of the form, there are three buttons: 'Back', 'Save Draft (Valid For 30 Days)', and 'Next'.

Main Applicant's Direct Credit Bank Account Details

Get quicker access to cash with our direct crediting service

1. SGD/USD payments for cash outflows (dividend payout/redemption/cash account withdrawal) will be credited into the bank account provided.
2. Payments will be made in the name of the main account holder. Payment to a third party is not allowed.
3. Redemption proceeds will be paid in SGD unless otherwise instructed.
4. Payments to overseas USD bank accounts will be made via telegraphic transfer. Bank charges incurred will be borne by the client and net off from the payment amount.

Please credit all cash outflows directly to my bank account

☒ Yes ☐ No

SGD Bank Account

Select Name of Bank

USD Bank Account

Select Your USD Bank Account Type

CPF Investment Details (Optional)

CPF Account No. (for CPFIS-SA)

CPFIS Agent Bank (for CPFIS-OA) CPF Investment Account No. (for CPFIS-OA)

SRS Details (Optional)

SRS Operator SRS Account No.

Back Save Draft (Valid For 30 Days) Next

New Client – MyInfo/ Manually Fill Forms

- Details required as per hardcopy forms.
- Fill in the required information accordingly.

The screenshot displays the 'Main Applicant's Employment Details' form within the iFAST system. The form is part of a four-step process: 1. Personal Information, 2. Beneficial Owner, 3. Fee Structure, and 4. Confirmation. The current step is 'Personal Information', which is further divided into six sub-sections: Personal Details, Contact Details, Bank Details, CPF & SRS, Employment (the active section), and Additional Due Diligence. The 'Employment' section contains the following fields: Occupation (dropdown), Name Of Employer (text), Contact No. (text), Employer Address Country (dropdown), Employer Address State (text), Town/Estate Name (text), Employer Address Postal Code (text), Employer Address - Block No. and Street Name 1 (text), Street Name 2 or Building Name (text), Unit No. (text), Annual Income in SGD (dropdown), and Source of Funds to be Invested (dropdown). Below these fields is a question: 'Are you a Director, Officer, Trading Representative or employee of a Stock Exchange Trading Member other than iFAST Financial Pte Ltd?' with radio button options for 'Yes' and 'No'. At the bottom of the form are three buttons: 'Back', 'Save Draft (Valid For 30 Days)', and 'Next'.

Personal Information 1 Beneficial Owner 2 Fee Structure 3 Confirmation 4

Personal Details ✓
Contact Details ✓
Bank Details ✓
CPF & SRS ✓
5 Employment
6 Additional Due Diligence

Main Applicant's Employment Details

Occupation

Name Of Employer Contact No.

Employer Address Country Employer Address State

Town/Estate Name Employer Address Postal Code

Employer Address - Block No. and Street Name 1

Street Name 2 or Building Name Unit No.

Annual Income in SGD

Source of Funds to be Invested

Are you a Director, Officer, Trading Representative or employee of a Stock Exchange Trading Member other than iFAST Financial Pte Ltd?

☐ Yes ☐ No

Back Save Draft (Valid For 30 Days) Next

New Client – MyInfo/ Manually Fill Forms

- By answering 'Yes' to one or more Additional Due Diligence questions, client will be required to completed the iFAST Enhanced Client Due Diligence (ECDD) Questionnaire and email in to iFAST.
- There will be transaction limitations on the account until iFAST review the questionnaire.

✓ Personal Details

✓ Contact Details

✓ Bank Details

✓ CPF & SRS

✓ Employment

6 Additional Due Diligence

Main Applicant's Additional Due Diligence

1. Location

Are you/Do you:

a) incorporated in the following countries/jurisdiction;
b) have registered address in the following countries/jurisdiction;
c) have a mailing address in the following countries/jurisdiction; or
d) born in/a citizen of the following countries/jurisdiction.

Country/Jurisdiction List

☐ Yes ☒ No

2. Occupation/Nature of business

Are you involved in the business of/employed by the following activities/employers that are: Money changers; remittance agents; pawnbrokers; internet-based stored value facility holders ⓘ

☐ Yes ☐ No

3. Politically Exposed Person ("PEP")

Are you a PEP/close associate of a PEP/family member of a PEP? ⓘ

☐ Yes ☐ No

i

By answering 'Yes' to one or more Additional Due Diligence questions, the Main Applicant/Joint Applicant/Beneficial Owner is required to complete the Enhanced Client Due Diligence (ECDD) Questionnaire and email it to our helpdesk at ifastadmin@ifastfinancial.com. There will be transaction limitations on the account until we complete our review of the questionnaire.

Save Draft (Valid For 30 Days)

Next

New Client – MyInfo/ Manually Fill Forms

- If there is a Beneficial Owner, system will prompt for the relevant information has to be filled in.
- Otherwise select 'No' to proceed if there is no Beneficial Owner

Personal Information 1 ✓ Beneficial Owner 2 Fee Structure 3 Confirmation 4

Main Applicant's Beneficial Owner

Do you have any beneficial owner(s)?

A 'Beneficial Owner', in relation to a customer of iFAST, means the natural person who ultimately owns or controls the customer or the natural person on whose behalf a transaction is conducted or business relations are established and includes any person who exercises ultimate effective control over a legal person or legal arrangement.

☐ Yes ☐ No

Back Save Draft (Valid For 30 Days) Next

Personal Information 1 ✓ Beneficial Owner 2 Fee Structure 3 Confirmation 4

Beneficial Owner Information

1 Personal Details
2 Contact Details
3 Additional Due Diligence

Nationality Country of Birth

Type of Identification

Salutation Full Name as in NRIC/Passport

Date of Birth Gender Race

New Client – MyInfo/ Manually Fill Forms

- Applicable for Wrap Account type only
- Input the Fees accordingly, system will show what is the range adviser can input
- Select the Fees deduction mode as well.

Wrap Fee Payment Method (Cash)

↓

Units Redemption

SGD Cash Account



Personal Information ✓ Beneficial Owner ✓ Fee Structure 3 Confirmation 4

Fee Structure (Wrap Fee)

Note: Subject to a maximum of 2% for Cash/SRS Investment and 0.58% for CPFIS OA/SA Investment

Unit Trusts

0.1 - 2 %

Exchange Traded Funds (ETFs)

0.1 - 2 %

Bonds

0 - 2 %

Stocks

0 - 2 %

Wrap Fee Payment Method (Cash)

↓

Wrap Fee Payment Method (Non Cash)

↓

Back Save Draft (Valid For 30 Days) Next

New Client – MyInfo/ Manually Fill Forms

- Check through the information input into the system before submitting.

Personal Information ✓ Beneficial Owner ✓ Fee Structure ✓ Confirmation 4

Main Applicant Beneficial Owner

Main Applicant's Details

Account Type	Wrap Personal
Type of Identification	Passport
Passport No	1234567
Passport Expiry Date	01 Feb 2022
NRIC Name	John Test
Nationality	Austria
Country of Issue	Austria
Country of Birth	Austria
Salutation	Mr
Gender	Male
Date of Birth	01 Feb 1980
Race	Others

Tax Residence Details

Singapore Tax Resident	N
Country/Jurisdiction of Tax Residence	-
Taxpayer Identification Number (TIN)	No TIN is required

Click on the 'Edit' icon to make changes if required.

New Client – MyInfo/ Manually Fill Forms

- Upload the necessary documents (System will prompt accordingly)

MyInfo

- NRIC Copy is not required
- Supporting document is required if Mailing Address differs from Registered Address

Manually Fill Forms

- Singaporeans/ PR: NRIC Copy, Supporting document is required if Mailing Address differs from Registered Address
- Foreigners: Passport + Supporting Document

***Do not submit FA Company documents here**

Upload Account Documents

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Passport Copy



Click or drag file to this area to upload

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Main Applicant Address Supporting Document



Click or drag file to this area to upload

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New Client – MyInfo/ Manually Fill Forms

- E-signature required to proceed
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Risk Disclosure Statement and Risk Warning Statement

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- The legal risk surrounding the transaction, including but not limited to the circumstances under which the transaction may be illegal, resulting in it being void and unenforceable.

Market Forces

- Your payments or receipts under a transaction will be linked to changes in the particular financial market or markets which the transaction is linked, and you will be exposed to price, currency exchange, interest rate or other volatility in that market or markets. You may sustain substantial losses on the contract, trade, product or financial investment if the market conditions move against your positions. It is in your interest to fully understand the impact of market movements, in particular the extent of profit/loss you would be exposed to when there is an upward or downward movement in the relevant rates, and the extent of loss if you have to liquidate a position if market conditions move against you. Your position may be liquidated at a loss, and you will be liable for any resulting deficit in your Account with iFAST.
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OK

- Beneficial Owner
- Personal Details
- Contact Details
- Employment
- Additional Due Diligence
- Upload Document

Main Applicant Beneficial Owner

Beneficial Owner

Do you have any beneficial owner(s)? If your answer is "Yes", please complete the Anti-Money Laundering Declaration form. **No**

Main Applicant's Signature



Clear

Risk Disclosure Statement and Risk Warning Statement

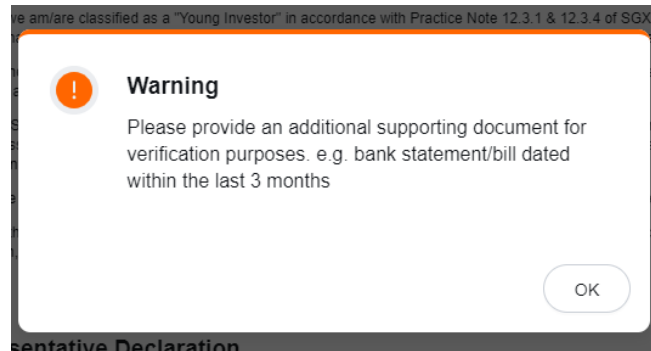
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- Additional Supporting Document will need to be emailed to iFAST for Account to be approved



Applicant(s) Declaration

- ☒ I/We hereby declare and warrant that the information given in this form submitted to you are complete, true and accurate and that I/we have not wilfully withheld any material fact/information. I/We shall give iFAST Financial Pte Ltd ("iFAST") written notice of any change in my/our particulars. By disclosing my/our personal data, I/we consent to iFAST collecting, using and/or disclosing my/our personal data for the purposes of administering my/our Investment(s) and Investment Account(s). I/We also consent to iFAST transferring my/our personal data to iFAST related group of companies and/or third party service providers, suppliers, agents, distributors, fund managers, intermediaries, or relevant stock exchanges for the above purposes. I/We declare that I/we am/are not undischarged bankrupt(s), have not committed any act of bankruptcy within the past 12 months and no bankruptcy order has been made against me/us or is/are pending against me/us during that period. I/We acknowledge that I/we am/are responsible for my/our own tax affairs and declare that I/we have not committed or been convicted of any tax crimes. I/We hereby consent the Representative and iFAST obtaining information immediately from me/us upon reasonable request for the purpose of Representative's and iFAST's compliance with the Notices and Guidelines on Prevention of Money Laundering and Countering the Financing of Terrorism. If any information is found false or misleading, iFAST may reject any of my/our application and/or instructions including but not limited to, any transactional-related activities. I/We understand that I/we can, at any time, request for advice from my/our financial adviser representative concerning a Specified Investment Product.
- I/We agree and acknowledge that the value of the Investment(s) may go up and down and by instructing iFAST to apply for any Investment(s) on my/our behalf, this risk which I/we am/are prepared to accept. I/We hereby irrevocably hold iFAST harmless (or "indemnify iFAST") from and against all losses, damages, costs and expenses whatsoever legal or otherwise, which I/we may sustain, suffer or incur as a result of the performance of any investment(s) and currency conversion connected with any transaction for the Account. I/We confirm that I/we have received, read, understood and agreed to be bound by this Application Form, the relevant Investment Account [Terms and Conditions](#), [Fee Schedule](#), product prospectus, product highlight sheets and [Important Notes for Transacting of Securities](#).
- Where I/we am/are classified as a "Young Investor" in accordance with Practice Note 12.3.1 & 12.3.4 of SGX-ST Rules (individuals above the age of 18 and below age of 21 years), I/we hereby confirm that the risks and uncertainties associated with trading or investing in securities have been properly explained to me/us and that I/we have an appropriate understanding of such risks.
- I/We acknowledge that I/we have received, read, understood and agree to the Risk Disclosure Statement relating to Securities and Risk Warning Statement for Overseas-Listed Investment Products and that the declarations are applicable to all my/our accounts.
- For CPFIS Investment: I declare that I have (1) opened a CPF Investment Account before; (2) invested under the CPF Investment Scheme - Special Account before; and/or (3) completed the Self-Awareness Questionnaire. If the above declaration is found to be false, I understand and agree that CPF Board will reject the withdrawal of monies from my Ordinary or Special account, as the Board thinks fit.
- Corporate account transactions: By approving, the above declarations would have deemed to be made by the authorised signatories on behalf of the entity/body/business.
- Unless otherwise disclosed in writing, I/We hereby declare and warrant that I/We am/are the ultimate Beneficial Owner of this account and that no person other than myself have or will have any interest in, influence or control over this account, whatsoever.

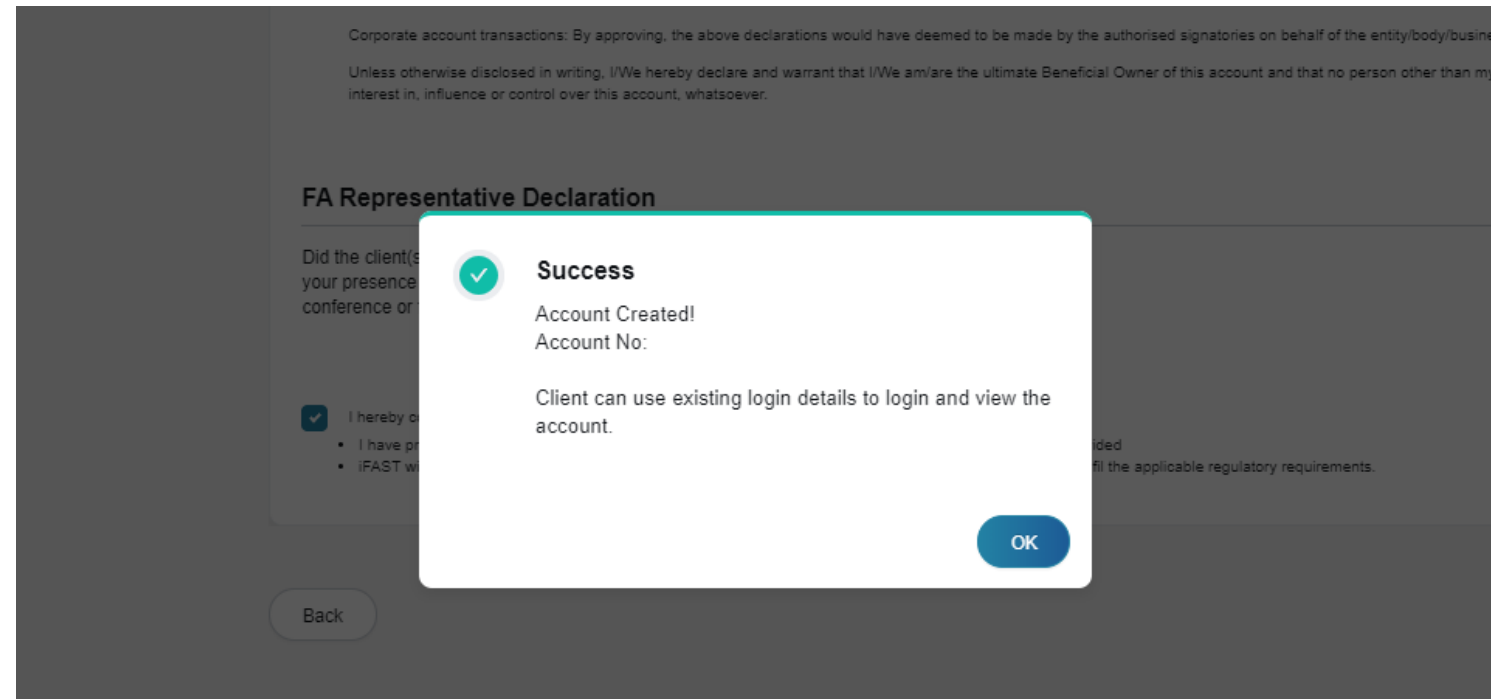
FA Representative Declaration

Did the client(s) sign off this form in your presence either through video conference or face to face? ☐ Yes ☒ No

- ☒ I hereby confirm and declare that
- I have provided the applicant(s) a copy of iFAST Terms and Conditions and Fee Schedule, and I have provided
 - iFAST with all the applicant(s) identification information and verification documents that are necessary to fulfil the applicable regulatory requirements.

New Client – Account Created Successfully

- Adviser will be able to input Buy Trade with the Account Number given, and client to endorse the trade via iSIGN as well.
- But take note that Account status is still in 'Pending Approval'
- Trades will only be routed to Supervisor for approval after account has been approved by Company and iFAST.



NFTF Submission – Submit via ‘Pending Approval’ Tab

Pending Approval2

Approved Account3

Rejected/Voided3

Saved Draft0

Approval Status▼

Show: 10▼

Create DateAccount No.Client NameNRIC/Passport No.Account TypeAdviserNext Approving Party

05 Jul 2021Via MyInfo

Wrap Personal

CompanyView Form

28 Jun 2021

Wrap Personal

FASTView Form

If “No” was indicated =
NFTF submission (video
conference included)

FA Representative Declaration

Did the client(s) sign off this form in your presence either through video conference or face to face?

☐ Yes☒ No

Download Supporting Documents

FA Company document

Upload additional ID in this box

Click or drag file to this area to upload

A maximum of 1 files can be uploaded, and they must be in either PDF, GIF, JPG or JPEG format.

The maximum permissible size for each uploaded fi

Cancel

Save

CREATING A TRADE VIA ISIGN (ADVISER LOGIN)

Create Transactions

Transactions
Create Transactions

Transact Cash Account

Transactions / Transact

Search by Name and Account

Col Huo Xing, Karen
[Redacted] Personal
[Redacted] EN
[Redacted] Non Wrap | Non-Wrap Personal

Create Transactions

- Transact
Buy, RSP, Sell, Switch
- Mass Switch
- Cash Account

Edit Transactions

- Edit/Approve Transactions
- Edit RSP

Transaction Status

- Pending/Historical
- Download Transaction Attachment
- RSP

Confirmation 3

Input your Client Name/Account No./Account Name at the search bar to initiate transaction.

New Account is instantly ready for trade creation!

Create Transactions

- Adviser will be able to input Buy Trade with the Account Number given, and client to endorse the trade via iSIGN as well.
- But take note that Account status is still in 'Pending Approval'
- Trades will only be routed to Supervisor for approval after account has been approved by Company and iFAST.

Transactions
Create Transactions

Transact Cash Account

Transactions / Transact

Search by Name and Account
G [REDACTED] | Non Wrap | Non-Wrap Personal

Select Client Enter Transaction

Account Status	Confirmed	Suspended	No	Account AI Status	Non-AI
SGK Position Account		FATCA Status	N/A	Discretionary Account	-
Auto-Sweep Status		CKA/CAR Status	CKA (Main) - CKA (Joint) - CAR (Main) - CAR (Joint) -	Risk Profile (by payment method)	Cheque CPFIS-OA CPFIS-SA SRS

Buy/RSP 1 Sell Switch

Product Type
UT

Product Name

UT RSP Special List First State Bridge A DIS SGD

Currency	Minimum Initial/Subsequent Amount	Minimum RSP Amount
SGD	SGD 1,000.00/SGD 100.00	SGD 100.00

☒ Buy ☐ RSP ☐ RSP via UT

Rationale

Rationale

5000 characters left.

Attached Files

Click or drag file to this area to upload

A maximum of 5 files can be uploaded, and they must be in either PDF, DOC, DOCX, XLS, XLSX, GIF, JPG or JPEG format.
The maximum permissible size for each uploaded file is 5MB.
Please be reminded that hardcopy CKA form/s should be completed and uploaded for Joint Accounts' transactions.

Gentle reminder to attach FP in 'Attached Files' during the 'Buy' submission process

Create Transactions

- Click on 'iSIGN' after the transaction has been created for the client to endorse the trade

Edit Transactions

Trade Created
We have notified the next approval party via email.

Transactions / Edit/Approve Transactions

Pending My Approval 0 Pending Supervisor Approval 1 Pending Client Approval 0

Pending Trade(s)

Approve By	Account No.	Client Name	NRIC/Passport No.	Account Type	Transaction Type	Supervisor	Attachment	Action
12 Aug 2020				h-Wrap Personal	UT Buy			<div>Edit iSIGN</div>

Attachment Action(s)

Yes Edit iSIGN

Endorsing Trade via iSIGN

Client will be prompted to answer CKA/CAR questions prior to approving trade

/ Edit/Approve Transactions

Customer Knowledge Assessment (CKA)/Customer Account Review (CAR)

Note(s)

It is important to find out if you have knowledge or investment experience to understand the risks and features of "Specified Investment Products" (SIP) which include unit trusts, exchange traded funds (ETFs), daily leverage certificates (DLC), structured warrants or similar products. This assessment, known as Customer Knowledge Assessment (CKA)/Customer Account Review (CAR), helps us to assess your knowledge or investment experience before making recommendations to you or approving/activating your account to transact in listed SIPs.

You understand that any inaccurate or incomplete information provided by you may affect the outcome of the assessment. You also acknowledge and agree that a copy of the form will be submitted to the relevant investment platform.

By proceeding to provide these information, you have given consent to the collection, use and disclosure of these information.

1. Educational Qualifications

Do you have a diploma or higher qualification in any of the following fields?
If yes, please indicate as applicable:

☐ Yes ☐ No

2. Do you possess any other professional finance-related qualifications?

(e.g., AFP/AWP/CFP, AFC/ChFC, ACCA, CLU, CFA/CAIA, CPA/CA, CISI, CFTe, FRM, CMFAS M6A/M8A/M9A)

☐ Yes ☐ No

3. Investment Experience

Have you conducted at least 6 transactions in the following "Specified Investment Products" (SIP) over the past 3 years?
(Please tick the type of investment traded)

☐ Yes ☐ No

4. Work Experience

Do you have a minimum of 3 continuous years of working experience* in the preceding 10 years involving the following fields?
If Yes, please indicate as applicable:

☐ Yes ☐ No

☐ I hereby declare that the information submitted by me is true and accurate.

Success

You have passed the Customer Knowledge Assessment (CKA).
You have passed the Customer Account Review (CAR).
Please note that transactions in listed SIPs (e.g. ETFs/DLCs/Structured Warrants) will only be submitted after your account is approved (for transactions in listed SIPs). This may take up to two business days.
Please note that the CKA/CAR questionnaire will be subjected to further review. In the event of a change of the CKA/CAR outcome from "Pass" to "Fail", your transaction(s) may be voided.

OK

Endorsing Trade via iSIGN

Reviewing the trade prior to endorse

Transactions / Edit/Approve Transactions

SONI WEE HING, HAREN | 70446800 | Non Wrap | Non-Wrap Personal

Account Status	Confirmed	Suspended	No	Account AI Status	Non-AI
SGX Position Account	Pending	FATCA Status	N/A	Discretionary Account	-
Auto-Sweep Status	<div><div></div><div>1</div></div>	CKA/CAR Status	CKA (Main) CKA (Joint) CAR (Main) CAR (Joint)	Pass 30 Jul 2021 Pass 30 Jul 2023 -	Cheque CPFIS-OA CPFIS-SA SR S

Buy Transaction

UTs

Product Name	Payment Mode	Investment Amount with Upfront Fee	Fee (%)/(\$)	Estimated Investment Amount	Dividend Option	Dividend Payout Currency	Advice Given	Suitability	Approval Sequence
First State Bridge A DIS SGD	Cash	SGD 1,000.00	Upfront: 0%/SGD 0 Processing: N/A	SGD 1,000.00	Payout	SGD	Yes	Yes	✓ Adviser > Supervisor > Client > In System

Consolidated Dividend Instruction (For cash investments only)

Product Name	Product Type	Dividend Frequency	Dividend Option	Dividend Payout Currency	Transaction Type
First State Bridge A DIS SGD	UT	Half-yearly	Payout	SGD	Buy

Endorsing Trade via iSIGN

Client to tick on declaration and sign off digitally on the spot to approve the trade

Payment Summary

Payment Mode	SGD
Cash	1,000.00
Total	SGD 1,000.00

Note(s)

Activity and Comments

✓ (Trade created)
K. [redacted] at 30-07-2020 20:23:53

Rationale

-

Attached Files

-

Client's Declaration

☒ I understand that I have completed the Customer Knowledge Assessment (CKA)/Customer Account Review (CAR) and have been informed of the outcome accordingly. For the above transactions, I acknowledge that:

- i. I have passed the CKA/CAR and do not wish to receive any advice offered by my Adviser;
- ii. I have passed the CKA/CAR, received advice from my Adviser based on the suitability of the investment product(s) and the investment product(s) that I intend to transact in is/are suitable for me;
- iii. I have passed the CKA/CAR, received advice from my Adviser based on the suitability of the investment product(s) and the investment product(s) that I intend to transact in is/are not suitable for me; and/or
- iv. I have failed the CKA/CAR, received advice from my Adviser based on the suitability of the investment product(s) and the investment product(s) that I intend to transact in is/are suitable for me.

I confirm proceeding with the above transaction(s). For (i) and (iii), I understand that I will not be able to rely on section 27 of the Financial Advisers Act (FAA) to file a civil suit claim in the event of a loss.

I/We hereby declare and warrant that the information given in this form submitted to you are complete, true and accurate and that I/we have not wilfully withheld any material fact/information. I/We shall give iFAST Financial Pte Ltd ("iFAST") written notice of any change in my/our particulars. By disclosing my/our personal data, I/we consent to iFAST collecting, using and/or disclosing my/our personal data for the purposes of administering my/our Investment(s) and Investment Account(s). I/We also consent to iFAST transferring my/our personal data to iFAST related group of companies and/or third party service providers, suppliers, agents, distributors, fund managers, intermediaries or relevant stock exchanges for the above purposes. I/We declare that I/we am/are not undischarged bankrupt(s), have not committed any act of bankruptcy within the past 12 months and no bankruptcy order has been made against me/us or is/are pending against me/us during that period. I/We acknowledge that I/we am/are responsible for my/our own tax affairs and declare that I/we have not committed or been convicted of any tax crimes. I/We hereby consent the Representative and iFAST obtaining information immediately from me/us upon reasonable request for the purpose of Representative's and iFAST's compliance with the Notices and Guidelines on Prevention of Money Laundering and Countering the Financing of Terrorism. If any information is found false or misleading, iFAST may reject any of my/our application and/or instructions including but not limited to, any transactional-related activities. I/We understand that I/we can, at any time, request for advice from my/our financial adviser representative concerning a Specified Investment Product.

Client to sign to proceed

Clear

Cancel

Client to review the attached FP before confirmation of trade

Endorsing Trade via iSIGN

Buy Transaction

UTs

Product Name	Payment Mode	Investment Amount with Upfront Fee	Fee (%)/(\$)	Estimated Investment Amount	Dividend Option	Dividend Payout Currency	Advice Given	Suitability	Approval Sequence	Action
First State Bridge A DIS SGD	Cash	SGD 1,000.00	Upfront: 0%/SGD 0 Processing: N/A	SGD 1,000.00	N/A	N/A	Yes	Yes	✓Adviser>✓Client>Supervisor>In System	Edit

Payment Summary

Payment Mode	SGD
Cash	1,000.00
Total	SGD 1,000.00

Note(s)

Activity and Comments

✓ (Trade created)
[redacted] at 30-07-2020 20:23:53

✓ (Client approved iSign trade into system)
[redacted] at 30-07-2020 20:30:31

Trade Approval Sequence will be updated in the system and will be pending supervisor for approval at the last stage before being transacted

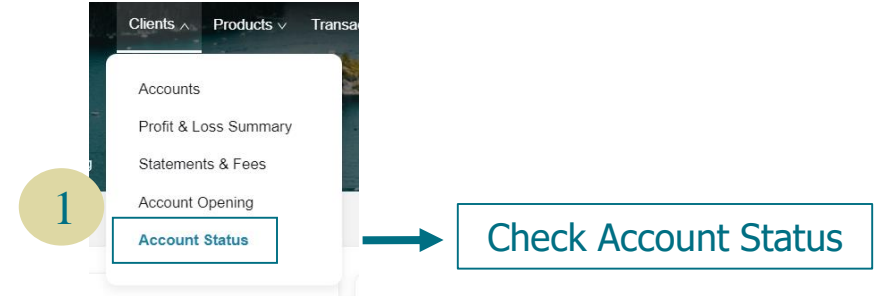
iFAST will review the signature endorsed by client for iSIGN transactions

ACCOUNT OPENING STATUS (ADVISED LOGIN)

Account Status – Pending Approval

Pending approval account opening is only valid for 14 calendar days from date of creation. Account will be voided if it was not approved within the time period and adviser will require to submit a new application.

Adviser can inform PIAS Business Support to void the account too



2

Pending Approval

2

Approved Account

3

Rejected/Voided

3

Saved Draft

0

Approval Status ▾

Show: 10 ▾

⌵

Create Date ▾	Account No. ▾	Client Name ▾	NRIC/Passport No. ▾	Account Type ▾	Adviser ▾	Next Approving Party
05 Jul 2021	██████	██████	██████	Non-Wrap Personal	Advisor John ██████	iFAST View Form
28 Jun 2021	██████	██████	██████	Wrap Personal	Advisor John ██████	iFAST View Form

<

1

>

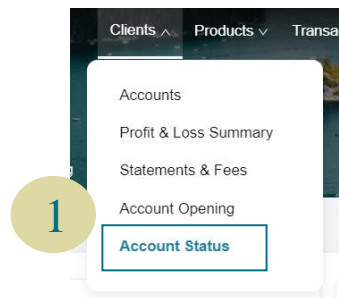
Note(s)

All accounts approved by company before 12pm will be processed by IFAST on the same business day (A).

Accounts approved after 12pm will be processed by IFAST the next business day (A+1).

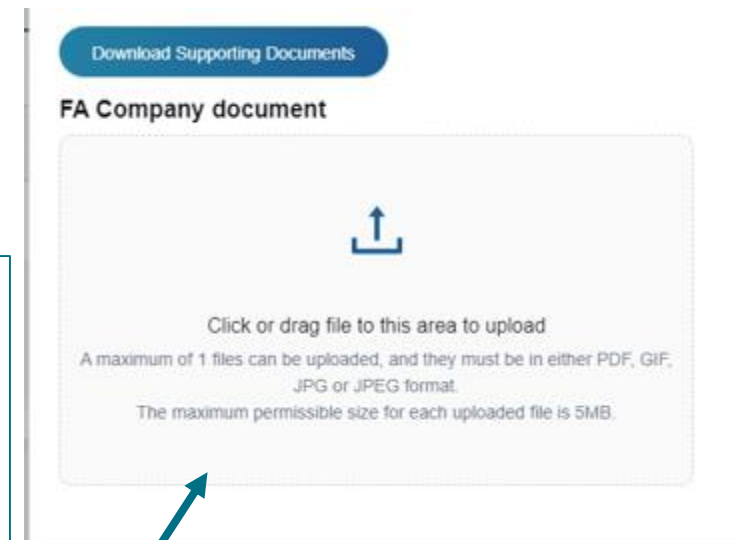
⌵

Account Status – Saved Draft



Check Account Status

- Click on Edit to attach additional FA Firm required documents.
- The attachment here is meant for FA firms only, iFAST will not refer to the attachments.



2

Pending Approval1

Approved Account0

Rejected/Voided0

Saved Draft1

Show: 10

Create/Update Date	Client Name	NRIC/Passport No.	Account Type	Action
02 Jul 2020			Wrap Person	<div>EditDelete</div>

Note(s)

All accounts approved by company before 12pm will be processed by iFAST on the same business day (A).
Accounts approved after 12pm will be processed by iFAST the next business day (A+1).

Account Status – Approved Account

Pending Approval2

Approved Account3

Rejected/Voided3

Saved Draft0

Approval Account History Show: 10

Approve Date	Account No.	Client Name	NRIC/Passport No.	Account Type	Adviser	Action(s)
23 Nov 2005				Non-Wrap Personal	Advisor	
11 Nov 2005				Wrap Personal	Advisor	
07 Nov 2005				Wrap Personal	Advisor	

Note(s)

All accounts approved by company before 12pm will be processed by IFAST on the same business day (A).
Accounts approved after 12pm will be processed by IFAST the next business day (A+1).

• Extract excel file of account opening details

1

Account Status – Rejected Account

- Once the new attachment is uploaded, application will be routed from 'Rejected/Voided' to 'Pending Approval'

- PIAS BS will reach out to advisor, stating the reason for rejected application

- Click on 'Edit' to attach additional FA Firm required documents.
- The attachment here is meant for FA firms only, iFAST will not refer to the attachments.

The screenshot displays the iFAST account status interface. At the top, there are four tabs: 'Pending Approval' (2), 'Approved Account' (3), 'Rejected/Voided' (3), and 'Saved Draft' (0). Below the tabs is a search bar and a 'Show: 10' dropdown. The main table lists account details with columns: Reject/Void Date, Account No., Client Name, NRIC/Passport No., Account Type, Adviser, Status, and Action(s). The third row is highlighted, showing a 'Rejected' status with an 'Edit' button. A callout box points to this 'Edit' button, explaining its function. Below the table is a 'Note(s)' section with a warning about processing times.

Reject/Void Date	Account No.	Client Name	NRIC/Passport No.	Account Type	Adviser	Status	Action(s)
14 Jul 2021	P0457174	John Doe P	S7820506G	Non-Wrap Personal	Advisor John Doe PIA00028 PIA00028	Voided	View
14 Jul 2021	P0457177	FirstTest	S9841924A	Wrap Personal	Advisor John Doe PIA00028 PIA00028	Voided	View
07 Jul 2021	P0457229	TAN HENG HUAT@TRICIA TAN XIAO HUI	S3100052A	Wrap Personal	Advisor John Doe PIA00028 PIA00028	Rejected	Edit

Note(s)

All accounts approved by company before 12pm will be processed by iFAST on the same business day (A).
Accounts approved after 12pm will be processed by iFAST the next business day (A+1).

Account Approval – Sample Emails

First email notification to Company for approval



Second email notification to remind Company on the 3rd day since creation for approval



Third email notification to remind Company on the 7th day since creation for approval



Email notification to adviser to inform account voided if account was not approved after 14 calendar days since creation

[P] Online account application pending your approval

IFAST Notification <do_not_reply@ifastfinancial.com>

Archived: 3/8/21, 8:43 PM
Sent: 3/8/21, 8:38 PM
To:

CC:
Folder: ops@ifastcorp.com » ops@ifastcorp.com » Inbox



Dear Valued Adviser(s),

The following online account application created by [redacted] is pending your approval:

Account No.	
Account Type	Wrap Personal
Client(s)	
Create Date	08 Mar 2021

For queries or clarifications, please contact your financial adviser.

Thank you.

Regards,
iFAST Financial Pte Ltd

iFAST Financial Pte Ltd (Company Registration 200000231R)
10 Collyer Quay #26-01 Ocean Financial Centre Building Singapore 049315

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Fair Dealing
iFAST is committed to sustainable business practices that are supported by a range of initiatives. For iFAST, fair dealing is about conducting our business in a transparent and ethical way that enhances value for all of our stakeholders and delivers fair dealing outcomes to our customers. Fair dealing is central to iFAST and the senior management and the board of iFAST are committed to aligning the direction of iFAST with fair dealing outcomes to all stakeholders. We recognise that this is a journey and best practice is continuously evolving.

iFAST Financial Pte Ltd is a member of Financial Industry Disputes Resolution Centre Ltd (FIDReC), which is an independent and impartial institution specializing in the resolution of disputes between financial institutions and consumers.

This is a system-generated email. Please do not reply.

(Reminder) Online account application(s) pending your approval

IFAST Internal Notification <support@ifastfinancial.com>

Archived: 3/10/21, 12:07 AM
Sent: 3/10/21, 12:05 AM
To:

CC:
Folder: ops@ifastcorp.com » ops@ifastcorp.com » Inbox



Dear Valued Adviser(s),

The following online account application(s) is/are still pending your approval:

Account No.	Account Type	Client(s)	Created By	With Transaction
	Wrap Personal			No

Please approve the application(s) by 21 Mar 2021, 2359 hours. Otherwise, we will void the application(s) and any transaction(s) created.

Thank you.

Regards,
iFAST Financial Pte Ltd

iFAST Financial Pte Ltd (Company Registration 200000231R)
10 Collyer Quay #26-01 Ocean Financial Centre Building Singapore 049315

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(Reminder) Online account application(s) pending your approval

IFAST Internal Notification <support@ifastfinancial.com>

Archived: 3/14/21, 12:09 AM
Sent: 3/14/21, 12:05 AM
To:

CC:
Folder: ops@ifastcorp.com » ops@ifastcorp.com » Inbox



Dear Valued Adviser(s),

The following online account application(s) is/are still pending your approval:

Account No.	Account Type	Client(s)	Created By	With Transaction
	Wrap Personal			No

Please approve the application(s) by 21 Mar 2021, 2359 hours. Otherwise, we will void the application(s) and any transaction(s) created.

Thank you.

Regards,
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10 Collyer Quay #26-01 Ocean Financial Centre Building Singapore 049315

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This is a system-generated email. Please do not reply. For queries or clarifications, please contact our helpdesk at +65-6557 2000 or send an email to ifastadmin@ifastfinancial.com.

Online account application(s) voided

IFAST Notification <do_not_reply@ifastfinancial.com>

Archived: 3/22/21, 12:10 AM
Sent: 3/22/21, 12:05 AM
To:

CC:
Folder: ops@ifastcorp.com » ops@ifastcorp.com » Inbox



Dear Valued Adviser (),

We have voided the following online account application(s) as your company did not perform the approval within 14 days of account creation:

Account No.	Account Type	Client(s)
	Wrap Personal	

Thank you.

Regards,
iFAST Financial Pte Ltd

iFAST Financial Pte Ltd (Company Registration 200000231R)
10 Collyer Quay #26-01 Ocean Financial Centre Building Singapore 049315

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This is a system-generated email. Please do not reply. For queries or clarifications, please contact our helpdesk at +65-6557 2000 or send an email to ifastadmin@ifastfinancial.com.

- Advisor and Company will be notified on all the following emails
- Client, Advisor and Company will receive a notification once the account is completely approved

CONTACT US

iFAST Helpdesk

Tel: 6557 2000

Email: ifastadmin@ifastfinancial.com

(8:30am to 10:30pm, Monday to Friday)

Business Development Team

Kermeu Koh | 9457 4945 | kermeu.koh@ifastfinancial.com

Justin Teoh | 8788 9779 | justin.teoh@ifastfinancial.com

Karen Goh | 9172 1025 | karen.goh@ifastfinancial.com

Ivan Loke | 8399 6573 | ivan.loke@ifastfinancial.com

