

客戶資料更改表格 (個人客戶)

Change of Customer's Personal Data Instruction Form (for individual)



致： 星展銀行(香港)有限公司 (「銀行」，包括其繼承人及受讓人)

To: DBS Bank (Hong Kong) Limited ("the Bank", which includes its successors and assigns)

CIF No.

- 注意 Note:** 1. 請以英文正楷填寫此表格，在適當方格內加上「✓」號及刪除不適用者，並刪去未被應用的空位。
Please complete in **BLOCK LETTERS**, tick (✓) the applicable box and delete as appropriate and cross out any of the unused spaces.
2. 此表格 **不適用於** This form is **not applicable** to:
- i) **保險計劃持有人** (按揭物業火險除外)。如需更改保險計劃的個人資料，請直接與保險公司聯絡。
Holders of insurance plans (other than Mortgage Fire Insurance). Please contact the insurance company directly for change of personal data for insurance plans.
 - ii) 未持有任何個人銀行產品的**私人銀行客戶**。請聯絡您的客戶經理以安排更改個人資料。
Private Bank customers who do not maintain any retail banking product. Please contact your Relationship Manager for the personal data change.
3. 除「更改個人資料」外，您可將填妥表格(a)寄往郵政信箱 400 號或(b)投入銀行任何一分行內的投遞箱。
EXCEPT "Change of Personal Data", you may return the completed form (a) by mail to GPO Box 400, or (b) by putting in the Drop Box at any branch of the Bank. (<https://www.dbs.com.hk/index/locator.page>).
4. 資料更改一般會於收到填妥的表格後 **5 個工作天內** 處理。
The change will normally be processed within **5 business days** from receipt of a duly completed Form.
5. 請確認您已經閱讀及理解本行的資料政策，才向本行提供您的個人資料。如您在此表格提供個人資料，即表示您接納本行的資料政策及同意資料政策中所載的個人資料用途。
Before you provide the Bank with your personal details, please ensure that you have read and understood the Bank's Data Policy. By providing personal details to the Bank under this form, you shall be deemed to have accepted the Bank's Data Policy and agreed to the use of your personal details as stated therein.
6. 如客戶把其任何地址/電話號碼更改為美國或經濟合作與發展組織自動交換資料的稅務國家(國家/區域)/管轄區的地址/電話號碼，或將國籍(國家/區域)更改為美國，則亦要填寫美國國稅局的適用表格或個人稅務居民身份自我證明表格。
If any address/telephone number is changed to an address/a telephone number in the USA or a country (country/region) or jurisdiction of tax residency defined in OECD's automatic exchange of information, or the nationality (country/region) is changed to USA, an Internal Revenue Service form or an Individual Tax Residency Self Certification Form should also be completed.
7. 基於美國證券交易的管制，如客戶把其任何地址更改為美國地址，銀行將不能繼續向該客戶提供投資服務，而所有證券戶口及基金投資戶口將被取消。
In compliance with the securities trading restrictions in the United States of America (USA), if a customer changes any address to an address in the USA, the Bank will no longer be able to offer any investment services to the customer and all securities accounts and investment fund accounts will have to be closed.
8. 如果任何住宅地址更改為歐洲經濟區^[1]的地址，您將被視為歐洲經濟區的零售投資者。因此，您的證券戶口及/或基金投資戶口(如有)將無法買入所有相關投資產品。我們將於未來數星期作出安排以限制您的投資戶口進行相關投資。詳情請參閱「注意事項」欄的事項 VII。
If any residential address is changed to an address in the European Economic Area ("EEA")^[1], you will be classified by us as a retail investor in the EEA. As such, your securities account and/or investment fund account, if any, will have to be blocked from performing all purchase transactions. For details, please refer to point VII under "Points to Note" section below.
- ^[1] 奧地利、比利時、保加利亞、克羅地亞、賽普勒斯共和國、捷克共和國、丹麥、愛沙尼亞、芬蘭、法國、德國、直布羅陀、希臘、匈牙利、冰島、愛爾蘭、意大利、拉脫維亞、列支敦斯登、立陶宛、盧森堡、馬爾他、荷蘭、挪威、波蘭、葡萄牙、羅馬尼亞、斯洛伐克、斯洛文尼亞、西班牙、瑞典及英國。
European Economic Area includes Austria, Belgium, Bulgaria, Croatia, Republic of Cyprus, Czech Republic, Denmark, Estonia, Finland, France, Germany, Gibraltar, Greece, Hungary, Iceland, Ireland, Italy, Latvia, Liechtenstein, Lithuania, Luxembourg, Malta, Netherlands, Norway, Poland, Portugal, Romania, Slovakia, Slovenia, Spain, Sweden and the United Kingdom.

客戶資料 Customer Information

(必須填寫 Must be Completed)

姓名 Name (英文 English)		(中文 Chinese)	
身份證明文件號碼 ID Document No.	生效日期 Effective Date:	<input type="checkbox"/> 即時生效 Immediate	<input type="checkbox"/> 由 From
Applicable to customers with only a mortgage loan account: <input type="checkbox"/> Borrower <input type="checkbox"/> Mortgagor <input type="checkbox"/> Guarantor		Mortgage Loan Account No. <input type="checkbox"/> 樓宇按揭戶口號碼:	
適用於只持有樓宇按揭貸款戶口的客戶:			

更改地址 Change of Address (I, II, III)

注意 Note: 1. 郵政信箱地址不可作為住宅地址，也不可用作信用卡戶口、循環貸款戶口及定額私人貸款戶口的通訊地址。
P.O. Box address is not accepted as residential address; plus, not as correspondence address for credit card accounts, revolving loan accounts and personal loan accounts.

2. 「轉交」郵件的代收地址不可作為住宅地址及通訊地址。
"In-care-of" is not accepted as the residential address and correspondence address.

3. 新通訊地址適用於您在銀行開立的所有單名戶口、21 歲以下受益人的信託戶口及聯名戶口。
The **new correspondence address** applies to ALL your sole name account(s), trust account(s) for beneficiary(ies) below 21 years old and joint name account(s) maintained with the Bank.

<input type="checkbox"/> 住宅及通訊地址 Residential & Correspondence address	<input type="checkbox"/> 住宅地址 Residential address
<input type="checkbox"/> 通訊地址 Correspondence address	<input type="checkbox"/> 辦事處地址 Office Address

詳細地址 (必須提供英文地址。)
Address Details (Must be provided in ENGLISH.)

Flat / Room	Floor	Block	Building	Street / Road	District / Area	Postal Code / Country (Country/Region)
(中文, 非必要但所提供的中文詳細地址須與英文地址相同。)						
國家(國家/區域)	區	街道	大廈	座	樓	室 郵區編碼

更改地址 Change of Address (I, II, III)

☐ 如有個別戶口無須更改通訊地址，請註明：
Please specify any particular account(s) to be **excluded** from this correspondent address change _____

☐ 信用卡、循環貸款及定期私人貸款戶口 - 更改地址為香港以外的原因
Credit card, revolving loan and personal loan accounts - Reason for changing to an address outside Hong Kong _____

如持有聯名戶口請填寫 Complete below if you have joint name account(s) with the Bank:

☐ 聯名「單簽」 (戶名 Account Name#: _____)
Joint name "Either-to-sign"

☐ 聯名「聯簽」 (戶名 Account Name#: _____)
Joint name "Joint-to-sign"

* 只限於其他聯名戶口持有人在銀行沒有單名戶口/任何其他聯名戶口。
Only if the other joint name account holders **DO NOT** have sole-name account / any other joint name account with the Bank.

☐ 本人/我們想將此聯名戶口其他持有人的通訊地址也更改為此新地址。
I/We wish to change the other account holder(s)' correspondence address for this joint name account to the new address as well.

更改聯絡資料 Change of Contact Information (V, VI)

☐ 聯絡電話號碼 [如屬海外電話號碼，請於號碼前加入國家(國家/區域)編碼及地區編碼(如有)。]
Contact Phone Numbers [For overseas phone number, please add country (country/region) code and area code (if any) in front of the number.]

	刪除銀行現有紀錄的電話號碼 Delete existing phone no. in the Bank's record	更改為 Amend To	新增 Add
住宅電話 Home Tel.	()	()	()
流動電話 Mobile Phone**	()	()	<input type="checkbox"/> 接收 Receive OTP**
辦事處電話 Office Tel.	()	()	()
傳真號碼 Fax No.	()	()	()

☐ 新電郵地址
New Email Address** _____

** 1. 您必須使用您自己專用的流動電話號碼或電郵地址接收短訊/提示訊息通知，包括但不限於星展 iBanking 網上理財及信用卡交易的「一次專用密碼」、證券買賣自動覆盤提示、電子結單及電子通知。
You must use your own exclusive mobile number or email address to receive SMS / notifications, including but not limited to the One Time Password (OTP) for DBS iBanking and credit card transactions, Securities Order Confirmation Alert, eStatement and eAdvice.

2. 所提供的流動電話號碼或電郵地址將取代之前登記於銀行用作收取短訊/提示訊息通知的流動電話號碼或電郵地址。
The provided mobile number or email address will supersede any mobile number or email address previously registered with the Bank for receiving SMS / notifications.

3. 如您現有的流動電話號碼或電郵地址已登記作轉數快賬戶綁定服務之用，請在更新之前通過轉賬>至易轉設終止綁定星展銀行賬戶。當新流動電話號碼或電郵地址生效後，您可使用它們重新登記。
If your existing mobile number or email address are registered for **FPS Addressing Service**, please **unregister** via Transfers > Transfer Settings before you update them. You can register with the new mobile number or email address once they become effective.

更改職業資料 Change of Employment Details

☐ 自僱 Self-employed ☐ 全職受僱 Permanent Employed-Full Time ☐ 兼職受僱 Permanent Employed-Part Time **Bank Use Only (codes)**

☐ 退休 Retired ☐ 全職合約僱員 Contract-Full Time ☐ 兼職合約僱員 Contract-Part Time

☐ 非在職 Not Currently Employed ☐ 其他 Others _____

職業 Occupation: ☐ 家庭主婦 Housewife ☐ 學生 Student ☐ 其他 Others _____

僱主名稱 Name of Employer®: _____

業務性質 Nature of Business: _____

職位 Position: _____

® 如您持有任何投資戶口/財富管理戶口/星展豐盛私人戶口而僱主是《證券及期貨條例》界定的持牌法團或註冊機構，則需要僱主的書面同意才可繼續享用投資服務。
If you maintain any Investment Account / WMA / TPC and your employer is a licensed corporation or registered institution as defined under the Securities and Futures Ordinance, a consent letter from your employer is required before you can continue to enjoy our investment services.

更改個人資料 Change of Personal Data

(連同身份證明文件正本及/或有關法律文件親自前往分行辦理。)
(Submit in-person with the original identification document and/or relevant legal documents.)

☐ 更改本人姓名為
Change my name to _____

☐ 更改本人身份證明文件類別、號碼為
Change my identification document type and no. to _____ 到期日 (如適用)
Expiry date (if applicable) _____

☐ 更改本人國籍 (國家/區域)等為
Change my nationality (country/region), etc to _____

☐ 更改其他個人資料 (請註明)
Change other personal data (pls specify): _____

有關本人/我們的個人資料用於直銷推廣的確認 Acknowledgement of Use of My/Our Personal Data in Direct Marketing

本人/我們明白，銀行擬將本人/我們的個人資料用於直銷推廣，惟必須先獲得本人/我們的同意。本人/我們曾就是否接收直銷推廣聯繫或資訊作出選擇，本人/我們現確認本人/我們的現有選擇將維持不變，而本更改表格內提供的所有資料均可根據該項選擇加以使用。本人/我們明白，如本人/我們欲更改現有的選擇，本人/我們可隨時填妥拒絕直銷推廣表格後交回銀行，且無須就此支付任何費用。

I/We understand that the Bank intends to use my/our personal data in direct marketing and cannot do so without my/our consent. I/We have previously selected whether or not to receive direct marketing contact or information and I/we confirm that there is no change to my/our existing choice and all information provided in this instruction form shall be used in accordance with such choice. I/We understand that if I/we wish to change my/our existing choice, I/we may do so at any time and without charge by completing an opt-out form and returning it to the Bank.

簽署 Signature (IV)

請確認您的指示已清楚、準確及完整地填妥於本表格內，並同意受銀行的適用條款及細則所約束才簽署作實。

Please confirm that your instructions have been clearly, accurately and completely set out in this form before signing it, and complete and agree to be bound by the applicable terms and conditions of the Bank.

適用於更改地址欄選擇聯名「聯簽」的客戶

Applicable to customers selected Joint name "joint-to-sign" in Change of Address section

簽署人姓名 Name of Signatory: _____

日期 Date: _____

聯名簽署人姓名 Name of "Joint-to-sign" Signatory: _____

日期 Date: _____

❖ 請用留存銀行的簽署樣式。Please use the signature as filed with the Bank.

❖ 聯名戶口而須「聯簽」者，有關人士均須簽署於同一表格。For joint account(s) requiring joint-to-sign, ALL concerned parties must sign on the same form.

❖ 樓宇按揭貸款戶口的聯名借貸人必須全體簽署。For mortgage loan account of co-borrowers, ALL borrowers must sign.

注意事項 Points to Note

(I) 一般而言，您名下所有戶口（包括所有其他戶口持有人均登記相同通訊地址的聯名戶口）的綜合月結單將寄往新地址。註明無須更改地址的戶口則會獲發獨立的月結單。
Generally, you will receive a consolidated statement sent to the new address for ALL of your account(s) (including joint account(s) if all other joint account holder(s) have the same correspondence address). For the particular account(s) excluded from this change, a standalone statement will be issued.

(II) 若您是聯名戶口月結單的唯一收取人，您同意在收到月結單後給其他聯名戶口持有人查閱。
For joint name account, if you are the only recipient of the standalone statement, you agree to share it with other joint account holder(s) upon receipt of the statement.

(III) **僅適用於持有財富管理戶口/星展豐盛私人戶口的客戶：** 您的財富管理戶口/星展豐盛私人戶口綜合月結單將寄往新地址，與此等戶口登記同一戶名的所有其他戶口亦會包括在綜合月結單內。
Only Applicable to customer with Wealth Management Account (WMA) / DBS Treasures Private Client Account (TPC): Your WMA / TPC consolidated statement containing information of your WMA / TPC account and all your other accounts in the same account name as WMA / TPC account will be sent to you at the new address.

(IV) 如屬通訊地址以外的更改，本人/我們明白以上更改適用於本人在銀行開立的所有戶口（包括但不限於存款、貸款、投資戶口、信用卡及保管箱）。
For changes other than correspondence address, I/ we understand that the above changes apply to **ALL** my/our accounts maintained with the Bank (including but not limited to deposits, loans, Investment Accounts, credit card and safe deposit box).

(V) 當您身處外地或使用外地流動電話服務網絡時，該服務供應商可能未必支援接收國際短訊。同時，您的服務供應商亦可能會收取費用。銀行不會承擔任何由服務供應商或其他有關機構所收取的費用。
If you are abroad or using an overseas mobile service network, the service provider may not allow you to receive international SMS. In addition, service charges may be levied by your service provider. The Bank will not be liable to any charges requested by the service provider of the mobile number or any other related parties.

(VI) 「一次專用密碼」的傳送及接收可能會因為上述流動電話號碼的服務供應商或其他有關機構的網絡交通繁忙而有所延誤。銀行對電訊網絡故障造成服務中斷、延誤或無法提供不承擔任何責任。
Delivery of the SMS-based OTP may be subject to delayed transmission due to network traffic of the service provider of the mobile number specified above or any other related parties. The Bank will not be liable for any interruption, delays or unavailability due to any failure of the telecommunication network.

(VII) 住宅地址更改為歐洲經濟區^[1]的地址：就零售及保險投資產品組合提供重要資訊文件（KIDS）的新規例（歐盟規例第 1286/2014 號，普遍稱為「PRIIPs 規例」）已於 2018 年 1 月 1 日生效。PRIIPs 規例影響星展銀行能否繼續為居於歐洲經濟區的零售投資者（不論國籍（國家/區域））提供結構性票據及其他在 PRIIPs 規例管轄範圍內產品。星展銀行將戶口實益擁有人為歐洲經濟區居民的所有客戶視為零售投資者。（注意：對於信託戶口，星展銀行將本身為歐洲經濟區居民的所有委託人視為零售投資者）。證券戶口及 / 或基金投資戶口（如有），將無法買入所有相關投資產品。
For change of residential address to an address in the EEA^[1]: New regulation on key information documents (KIDS) for packaged retail and insurance-based investment products (Regulation (EU) No. 1286/2014, commonly referred to as the **PRIIPs Regulation**) came into effect on 1 January 2018. The PRIIPs Regulation impacts DBS' ability to continue to offer to retail investors, who are residents (regardless of nationality (country/region)) in the EEA, structured notes and other products that fall within the scope of the PRIIPs Regulation. DBS treats all our clients whose beneficial owners are residents in the EEA as retail investors by default. (Note: For trust accounts, DBS treats all EEA resident settlors as retail investors). Securities account and/or investment fund account, if any, will therefore be blocked from performing all purchase transactions.

FOR BANK USE ONLY

Attended by (Name, Signature & Date)	Initial the action(s) taken: <div style="display: flex; justify-content: space-around;"> <div style="border: 1px solid black; border-radius: 50%; width: 40px; height: 40px; text-align: center; line-height: 40px;">SV</div> <div style="border: 1px solid black; border-radius: 50%; width: 40px; height: 40px; text-align: center; line-height: 40px;">IDV/AHV</div> </div> (Name & date if different from attending staff.)	Check if > Any proof document required > Any US/CRS indicia IRS form / Self Cert: <input type="checkbox"/> Yes <input type="checkbox"/> No Proof doc copy: <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Joint name applies at the same time: All related CIF No. Face-to-face: <input type="checkbox"/> Yes <input type="checkbox"/> No IAH Checked <input type="checkbox"/> Y / <input type="checkbox"/> NA	Call back: <input type="checkbox"/> Yes <input type="checkbox"/> No Staff name & initial: <div style="border: 1px solid black; border-radius: 50%; width: 40px; height: 40px; text-align: center; line-height: 40px;">MA</div> Ext. no., date & time: 1IP & 2OP <input type="checkbox"/> S / <input type="checkbox"/> F IAH Checked <input type="checkbox"/> Y / <input type="checkbox"/> NA	Approved by (Name, Signature & Date)
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