

SECTION A: DETAILS OF CORPORATION

Name of Corporation (as per Certificate of Incorporation)

Certificate of Incorporation No.

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SECTION B: INVESTMENT RISK

1. Are any of your shareholder(s) 60 years old or above?

Yes No

2. In the event of a sudden loss in stable income, does your shareholder(s) have emergency funds set aside?

Yes No

3. Does any of your shareholder(s) suffer from any conditions that may affect their ability to make an informed investment decision?

Yes _____

No

4. Does any of your shareholder(s) have difficulty comprehending documents in English?

Yes _____

No

5. Does any of your shareholder(s) struggle with performing online activities, such as email, browsing websites, retrieving OTP, and / or navigating a mobile application?

Yes No

6. Please share any other information on your shareholder(s) that you believe may impact their ability to make sound investment decisions.

SECTION C: INVESTOR'S DECLARATION

I/We hereby declare that: All information in this document are true, complete and accurate.

I/We am/are aware that should there be any change in my/our risk profile, my/our existing monthly recurring investment contributions*, where applicable, shall continue unless a request for change is made by me/us.

*e.g. SmartSave Plan

Signature of Authorised Signatory

Signature of Authorised Signatory

SECTION D: COMPULSORY FOR DISTRIBUTOR (AUTHORISED UTC / PRC)

Based on the investor's declaration, is the investor a VI?

Yes No

Based on the Consultant's assessment, is the investor a VI?

Yes No

Based on your assessment, please explain your decision:

My observations of the investor aligns with his / her declaration

My observations of the investor aligns with his / her declaration, and in addition to that,

My observations of the investor DOES NOT align with his/her declaration due to the following reason(s):

Name of *UTC / PRC (as per NRIC): _____

*UTC / PRC Contact No.: _____

*UTC / PRC Code: _____

*Delete where not applicable.

Signature

Date: