

UPDATE OF PARTICULARS

Individual
Please be informed that your information will be updated across all your accounts maintained with us, unless otherwise indicated for Section 4 and 5.

Use only **BLOCK LETTERS** and **BLACK INK** when completing this form and tick where applicable.

Note: Under the OECD Common Reporting Standard for Common Exchange of Financial Account Information (the CRS), it is important for the Account Holder to provide BOS Wealth Management Malaysia Berhad (BOSWM MY) with complete and accurate tax residence status and related information. For any change in circumstances which affects the Account Holder's information provided in relation to the CRS, it is important that the Account Holder must advise us within 30 days of any such change and provide us with an updated CRS Self-Certification Form.

PERSONAL DETAILS AS IN CURRENT RECORD OF PACIFIC MUTUAL:

First Applicant
Name
NRIC (New) / Passport No.

Joint Applicant
Name
NRIC (New) / Passport No.

1 PARTICULARS OF APPLICANT (MANDATORY INFORMATION)

First Applicant
Tel. No.
Occupation
 Professional Managerial Clerical Student Skilled Worker
 Director / Senior Management Retiree / Pensioner / Housewife
 Executive Businessman Others (Please specify)
Annual Household Income
 < RM24,000 RM24,001 - RM60,000 RM60,001 - RM120,000
 RM120,001 - RM240,000 > RM240,000
Source Of Income
 Business Employment Inheritance Investment
 Savings Others (Please specify)

Joint Applicant
Tel. No.
Occupation
 Professional Managerial Clerical Student Skilled Worker
 Director / Senior Management Retiree / Pensioner / Housewife
 Executive Businessman Others (Please specify)
Annual Household Income
 < RM24,000 RM24,001 - RM60,000 RM60,001 - RM120,000
 RM120,001 - RM240,000 > RM240,000
Source Of Income
 Business Employment Inheritance Investment
 Savings Others (Please specify)

2 OTHER PARTICULARS

First Applicant
Title NRIC (New) / Passport No.
Marital Status Nationality
For Non-Malaysian Tax Resident, please state your Tax Resident Country
Religion Islam Buddhism Christianity Hinduism
 Others (Please specify)
Mother's Maiden Name

Joint Applicant
Title NRIC (New) / Passport No.
Marital Status Nationality
For Non-Malaysian Tax Resident, please state your Tax Resident Country
Relationship With First Applicant
Mother's Maiden Name

3 CHANGE OF CORRESPONDENCE DETAILS

New Correspondence Address
Postcode City/Town State Country
Tel. No.(H) Tel. No.(HP) Tel. No.(O) Fax. No.
E-mail Address

4 CHANGE OF DISTRIBUTION INSTRUCTION

Reinvest Bank Transfer
Note: Distribution amounting to less than or equal to the amount of RM200 will be automatically reinvested on the distribution payment date. For specific account(s), please indicate:

Bank Name Bank Account No. Bank Branch

5 CHANGE OF SERVICING AGENT

I/We hereby notify that I/we wish to change the existing servicing agent, named agent code to a new agent, named agent code for all accounts. For specific account (s), please indicate

6 DECLARATIONS AND SIGNATURES

I/We declare that all particulars and information given in this Update of Particulars form are true and correct and that I/we have not withheld any material facts or information from BOS Wealth Management. BOSWM MY is entitled to fully rely on such information for all purposes. I/we undertake to furnish BOSWM MY with additional information as BOSWM MY may require at any time and also undertake to inform BOSWM MY of any changes with regard to the particulars stated herein from time to time.
I/We hereby agree to indemnify BOSWM MY, the Trustee(s) and any of their agents against any actions, proceedings, claims, losses, damages, costs and expenses which may be brought against, suffered or incurred by any or all of them arising either directly or indirectly out of or in connection with BOSWM MY accepting, relying on or failing to act on any instructions given by or on behalf of the applicants unless to the willful default or negligence of BOSWM MY.

First Applicant Date
Joint Applicant Date

FOR OFFICE USE ONLY

Remarks <input type="text"/>	Effective Date <input type="text"/>	Form Verified By <input type="text"/> Date <input type="text"/>	Received Date Stamp <input type="text"/>
		Processed By <input type="text"/> Date <input type="text"/>	
Signature Verified By <input type="text"/> Date <input type="text"/>		Checked By <input type="text"/> Date <input type="text"/>	