

Please complete all sections unless otherwise indicated.

This account comes with OCBC Online Banking for the main applicant only

## 1 Your share counters For information about any of the companies listed below, please visit [www.sgx.com](http://www.sgx.com) and use the relevant code.

Choose shares and investment amount. **Multiples of S\$100 only.** **Multiples of S\$100 only.**

<input type="checkbox"/> CapitaLand Limited (C31) .....	S\$ _____	<input type="checkbox"/> Singapore Press Holdings Ltd (T39) .....	S\$ _____
<input type="checkbox"/> CapitaLand Integrated Commercial Trust (C38U) .....	S\$ _____	<input type="checkbox"/> Singapore Technologies Engineering Ltd (S63) .....	S\$ _____
<input type="checkbox"/> ComfortDelGro Corporation Ltd (C52) .....	S\$ _____	<input type="checkbox"/> Singapore Telecommunications Ltd (Z74) .....	S\$ _____
<input type="checkbox"/> DBS Group Holdings Ltd (D05) .....	S\$ _____	<input type="checkbox"/> Starhub Ltd (CC3) .....	S\$ _____
<input type="checkbox"/> Keppel Corporation Ltd (BN4) .....	S\$ _____	<input type="checkbox"/> United Overseas Bank Ltd (U11) .....	S\$ _____
<input type="checkbox"/> Oversea-Chinese Banking Corporation Ltd (O39) .....	S\$ _____	<input type="checkbox"/> Wilmar International Ltd (F34) .....	S\$ _____
<input type="checkbox"/> SembCorp Industries Ltd (U96) .....	S\$ _____	<input type="checkbox"/> Nikko AM Singapore STI ETF (G3B) .....	S\$ _____
<input type="checkbox"/> Singapore Airlines Ltd (C6L) .....	S\$ _____	<input type="checkbox"/> Nikko AM SGD Investment Grade Corporate Bond ETF (MBH) .....	S\$ _____
<input type="checkbox"/> Singapore Exchange Ltd (S68) .....	S\$ _____	<input type="checkbox"/> Lion-Phillip S-REIT ETF (CLR) .....	S\$ _____
		<input type="checkbox"/> Lion-OCBC Securities Hang Seng Tech ETF (HST) ..	S\$ _____

## 2 You – main applicant

Name As in NRIC / Passport  Mr  Mrs  Ms  Mdm \_\_\_\_\_

NRIC / Passport number \_\_\_\_\_ Date of birth

Email address \_\_\_\_\_ Nationality \_\_\_\_\_ Singapore PR  Yes  No

Mobile number Fill in (+ country code - area code) if it is a foreign number \_\_\_\_\_ Occupation \_\_\_\_\_ Nature of business If self-employed \_\_\_\_\_

Home number \_\_\_\_\_ Residential address \_\_\_\_\_

We will contact you at the telephone numbers provided above for BCIP matters.

Are you a U.S. Tax Resident?  No  Yes Taxpayer Identification Number (TIN) \_\_\_\_\_

Country of birth \_\_\_\_\_ If you are born in United States but are no longer a U.S. Tax Resident, you need to furnish documents stated overleaf<sup>2</sup>

Employer name \_\_\_\_\_ Length of current employment \_\_\_\_\_ Annual Basic Income \_\_\_\_\_

## 3 Your child – joint applicant Below 18 years old

Name As in birth certificate / NRIC \_\_\_\_\_ Gender  Male  Female \_\_\_\_\_

Birth certificate / NRIC number \_\_\_\_\_ Date of birth

Nationality \_\_\_\_\_ Singapore PR  Yes  No \_\_\_\_\_

Length of current employment \_\_\_\_\_

Is your child a U.S. Tax Resident?  No  Yes Taxpayer Identification Number (TIN) \_\_\_\_\_

Country of birth \_\_\_\_\_ If your child is born in United States but are no longer a U.S. Tax Resident, you need to furnish documents stated overleaf<sup>2</sup>

## 4 Your settlement account This account will be used to credit or debit funds related to your investment. Tick one only

Use my existing OCBC deposit account ..... OCBC deposit account number Omit dashes \_\_\_\_\_ Any deposit account that requires 2 or more signatures is not allowed.

Open a new OCBC 360 Account\* in my name only \_\_\_\_\_

We will send you a mail on how to fund your account when your account is successfully opened.

### New account opening declaration Tick one only

- I am the beneficial owner and ultimately own or have effective control of the account. The account is used for savings or transactional purposes.
- I am NOT the beneficial owner and do not ultimately own or do not have effective control of the account. (Please proceed to an OCBC Bank branch to open your account)

### This new OCBC 360 Account comes with e-Statement, online banking, mobile banking and a debit card.

We will issue a new YES! debit card if none of these options are selected.

- Link account to existing YES! debit card number \_\_\_\_\_

OR

- Apply for new YES! debit card with this preferred name \_\_\_\_\_

\*If you are already the main account holder of an existing OCBC 360 Account, we will open an OCBC Statement Savings account for you instead.

## 5 Your marketing consent – main applicant

I am aware that, by signing up for this product or service, I am consenting to Oversea-Chinese Banking Corporation Limited and its related corporations (OCBC Group) – as well as their agents and authorised service providers – to collect, use and disclose my personal data, and to share this data with their business partners for marketing and promotional purposes. These purposes include the “Additional Purposes” set out in the OCBC Data Protection Policy, available at [www.ocbc.com/policies](http://www.ocbc.com/policies) or any OCBC Bank branch.

For avoidance of doubt, I am also aware that the above consent overrides any earlier withdrawal of such consent; should I wish to withdraw my consent later, I shall use the form available at [www.ocbc.com/consent-withdrawal-form](http://www.ocbc.com/consent-withdrawal-form) or any OCBC Bank branch.

- In addition, by checking the box, I also consent to OCBC Group contacting me via SMS, telephone call and other phone number-based messaging about products and services offered by OCBC Group, its business partners and agents, regardless of my registration(s) with the Do Not Call registry.

## 6 Your signature

I hereby confirm I have read and understood the Declaration and Agreement section on the overleaf and agree that the terms and conditions contained therein form part of my application for the opening of a Blue Chip Investment Plan account with OCBC Bank.

Signing instructions: Your BCIP account will be opened with ‘only one to sign’ condition. Once your child reaches the legal age of 18 years old, your child can apply to access and operate this account separately.

Your signature

Date

Fold here 

Postage will be paid by addressee. For posting in Singapore only.

**BUSINESS REPLY SERVICE  
PERMIT NO. 00578**



**OVERSEA-CHINESE BANKING CORPORATION LIMITED**  
INVESTMENT OPS DEPARTMENT  
18 CHURCH STREET  
#B1-01 OCBC CENTRE SOUTH  
SINGAPORE 049479

Co.Reg.No:193200032W

Glue all sides firmly. Do not staple or tape

**IMPORTANT NOTES**

OCBC has established two wholly-owned subsidiaries in Singapore and Malaysia to process certain selected transactions for OCBC's customers and for this purpose, customer information may be disclosed to these subsidiaries. Please be assured that customer information will continue to remain within the OCBC Group, subject to any mandatory disclosure required by the relevant regulatory authorities.

**U.S. TAX RESIDENT**

1. Definition - A citizen or permanent resident of the United States (eg. U.S. Green Card holder or someone who meets the requirements to be considered a resident under the substantial presence test); or any other person that is not a foreign person (as defined under U.S. federal tax law).
2. Furnishing of documents: Please furnish either one of these documents if you have stated that you are born in the United States but are no longer a U.S. Tax Resident: Certificate of Loss of Nationality of the United States; or Form I-407 (Abandonment of Lawful Permanent Resident Status)

**DEPOSIT INSURANCE SCHEME**

Singapore dollar deposits of non-bank depositors and monies and deposits denominated in Singapore dollars under the Supplementary Retirement Scheme are insured by the Singapore Deposit Insurance Corporation, for up to S\$75,000 in aggregate per depositor per Scheme member by law. Foreign currency deposits, dual currency investments, structured deposits and other investment products are not insured.

**APPLICABLE FOR NEW OCBC 360 ACCOUNT APPLICANTS ONLY**

**1. DEFINITIONS**

"I", "my", "me" means the OCBC Bank account holder and "you" means OCBC Bank.

**2. ADDITIONAL TERMS AND CONDITIONS FOR OCBC YES! CARD (IF APPLICABLE)**

- (i) "I" refer to customer, "you" refer to OCBC Bank.
- (ii) I am not a bankrupt and no statutory demand has been served on me;
- (iii) I authorise you to verify information given in this application with anyone (including, without limitation, with any credit bureau or any other organisations or corporations set up for the purpose of collecting and providing information relating to the credit standing of persons) without checking with me;
- (iv) I authorise you to disclose any information whatsoever relating to me that you shall consider appropriate to any person to whom disclosure is permitted or required by any applicable law or to any other person wherever situated for any purpose; and
- (v) I agree that you shall have the absolute discretion to decline my application for an OCBC YES! Debit Card without giving any reason and to retain documents submitted for this application.

Fold here 

For bank's use

<i>Savings account no.</i>	<i>Verified by</i>
<i>Checked by</i>	<i>Staff ID</i>
<i>Product code</i>	<i>Source code</i>

Glue all sides firmly. Do not staple or tape

Fold here 

**DECLARATION AND AGREEMENT**

- By signing on this application, I hereby confirm the following:
1. I have received, read and understood the Declaration and Agreement and agree that the terms and conditions therein form part of my application for the opening of a Blue Chip Investment Plan (the "BCIP") account with OCBC Bank ("OCBC").
  2. All the information I have provided in this application is true, accurate and complete. I will tell you immediately if any of the information changes.
  3. I confirm that I am opening the account for myself and not on behalf of any other person or entity.
  4. I have read and agree to be bound by the Terms and Conditions Governing The Blue Chip Investment Plan (the "BCIP Terms and Conditions"), and the Additional Terms and Conditions Governing Joint Accounts under The Blue Chip Investment Plan, Terms and Conditions Governing Deposits Accounts, Terms and Conditions Governing the OCBC 360 Account (Applicable for new OCBC 360 Account Applicants only), Terms and Conditions Governing Electronic Banking Service (Personal) and Terms and Conditions Governing OCBC Electronic Statements (Applicable for Applicants applying for OCBC Online Banking only), as may be amended from time to time which are available for viewing at [www.ocbc.com/bluechip](http://www.ocbc.com/bluechip) or from OCBC Bank branch.
  5. I agree and consent to the terms of OCBC Bank's (i) Data Protection Policy and (ii) FATCA and CRS Policies, both available at [www.ocbc.com/policies](http://www.ocbc.com/policies) or upon request.
  6. I declare that any savings and investments I hold with you, and any profits that they make, will comply with the tax laws of the countries where I live or which I am citizen of, and any other laws that apply. I consent to the disclosures as provided therein. All the information I have provided in this application is true and complete. I will tell you immediately if any of the information changes. I further agree to the additional terms and conditions overleaf.
  7. (Applicable for OCBC YES! Card Applicants only) I understand that I am applying for an OCBC YES! Card and that I can request for a PIN for OCBC Phone Banking Services and Internet Banking Services at any OCBC ATM upon receipt of my OCBC YES! Card. I acknowledge and agree that the OCBC YES! Card may only be used upon approval subject to the Terms and Conditions of the OCBC Debit Cardmembers Agreement.
  8. I agree to absolve OCBC from any liability whatsoever and to hold OCBC harmless and fully indemnified against all proceedings, liabilities, claims, losses, damages and expenses in respect of OCBC accepting and/or acting upon this authorisation or any other instructions from me.

**Authorisation to OCBC**

- I hereby authorise OCBC to:
- (i) receive all dividends, income or other distributions in respect of the securities; and
  - (ii) take whatever action OCBC considers appropriate in its absolute discretion in respect of the securities.

**GIRO instruction for Blue Chip investment Plan**

- I hereby instruct you to process the Billing Organisation's ("BO") instructions to debit my account as stated in Section 4.
- You are entitled to reject the BO's debit instruction if my account does not have sufficient funds and charge me a fee for this. You may also at your discretion allow the debit even if this results in an overdraft on the account and impose charges accordingly.
- This authorisation will remain valid and in force until terminated by your written notice sent to my address last known to you or upon receipt of my written notice of revocation through the BO.

**Billing Organisation :**

Oversea-Chinese Banking Corporation Limited Investment Ops  
Billing Organisation acc no: 7339-501-976799-458

**Limitations of the BCIP Account**

The BCIP account is opened for the purpose of enabling OCBC Bank to process my Purchase Instruction (as defined in the BCIP Terms and Conditions) and my Sale Instructions (as defined in the BCIP Terms and Conditions), and cannot be used to conduct regular trading activities.

**Blue Chip investment Plan**

Trading in securities can be very risky, and I may lose all the amount invested. I have considered carefully and exercise caution in making any trading decision and determine whether each trade is specifically suitable for me. Where necessary, I will speak to my own financial adviser who will assess whether the product is suitable for me based on my investment objectives, financial situation or needs.

The Blue Chip Investment Plan does not ensure me a profit or protect me against loss. The price and value of any securities and the income, if any, may fall or rise. I will make a loss when the value of my securities is less than the average cost of the securities I have purchased.

# Submission instructions

Please exclude this page from your return mail

## Am I eligible?

You need to be

- For main applicant (parent / legal guardian): 18 years old and over
- For joint applicant (child): Below 18 years old
- Singaporeans / Singapore PRs / Foreigners residing in Singapore.  
(Not applicable to U.S. Persons, e.g. citizen of U.S. or Green Card holder)

## How do I apply?

Complete this form, and attach copies of the required documents stated below and mail it to us.

### Main applicant (Parent / Legal guardian)

Singaporean /  
Singapore PR

If you are an existing OCBC customer

- Copy of NRIC (front and back)
- Copy of supporting legal documents showing legal guardianship if you are not the parent
- Tax residency declaration form

If you are NOT an existing OCBC customer

- Copy of NRIC (front and back)
- Original Singapore Phone Bill / Bank Statement / Utilities Bill showing residential address
- Copy of supporting legal documents showing legal guardianship if you are not the parent
- Tax residency declaration form

Foreigner  
residing in  
Singapore

If you are an existing OCBC customer

- Copy of passport with 6 months' validity
- Copy of valid student / long term / employment pass
- Copy of supporting legal documents showing legal guardianship if you are not the parent
- Tax residency declaration form

If you are NOT an existing OCBC customer

- Copy of passport with 6 months' validity
- Copy of valid student / long term / employment pass
- Original Singapore Phone Bill / Bank Statement / Utilities Bill showing residential address
- Copy of supporting legal documents showing legal guardianship if you are not the parent
- Tax residency declaration form

### Joint applicant (Child)

- Copy of birth certificate
- Copy of NRIC (front and back) if child is 15 years old and over
- Tax residency declaration form

## Submission checklist

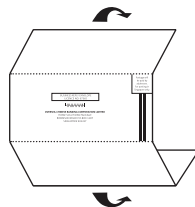
Have you

- Filled in all fields?
- Signed against any alterations?
- Signed section 6?
- Attached copies of required documents above?
- Attached the tax residency declaration forms?

## How to submit this form

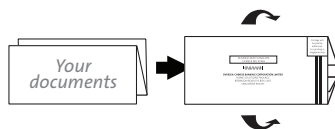
1

Fold the top and bottom sections inwards with the mailing address in front.



2

Enclose your documents within the sleeve created in Step 1.



3

Glue all sides firmly to secure your documents inside. Do not staple or tape.



## What happens after I submit this form?

1

You will receive a confirmation of your account opened within 7 business days from the date of receipt.

Your BCIP account will take effect next month if your application reaches us before 12pm on the last business day of this month. Otherwise, your account will take effect only in the second month following your submission of application.

2

If you have applied for OCBC Online Banking, once processed, your hardware token and login details will be mailed to you within 15 business days.

3

After your BCIP account has been set up, you may log in to OCBC Online Banking to view your holdings, and give instructions to amend your plan.