



You should only deal with a Marketing Representative (“MR”) registered with Berjaya Mutual Berhad (Formerly known as Inter-Pacific Asset Management Sdn Bhd). The list of registered MRs with Berjaya Mutual can be found in our website at <https://www.berjayamutual.com/>. If in doubt, please contact our Customer Service department at 03-2117 1889 or email us at enquiry_ipam@interpac.com.my.



Berjaya Mutual Berhad
 (Formerly known as Inter-Pacific Asset Management Sdn Bhd) (Berjaya Mutual)
 Registration No. 199001013139 (204709-U)
 West Wing, Level 13, Berjaya Times Square No. 1, Jalan Imbi, 55100 Kuala Lumpur
 Tel: 03-2117 1889 Fax: 03-2142 6029

**FOREIGN
 PRIVATE MANDATE
 ACCOUNT OPENING
 FORM**

INDIVIDUAL / JOINT

Individual Joint

Related Party Staff

1. PARTICULARS OF FIRST INDIVIDUAL APPLICANT

You must be 18 years of age as at the date of this application. Please attach a certified copy of your NRIC or Passport.

*Full Name (as per NRIC / Passport)

*Title : Mr Mrs Others, please specify: _____ *Date of Birth: _____ - _____ - _____

*NRIC No. : _____ - _____ - _____ Passport No. : _____

*Gender : Male Female Race: Malay Chinese Indian Others Religion : Muslim Non-Muslim

*Marital Status : Single Married Divorced Widowed No. of Dependents (Please indicate) : _____

*Nationality : Malaysian, Bumiputera Malaysian, Non-Bumiputera Non-Malaysian please specify : _____

Employment / Business Details

*Occupation : _____

*Name of Employer / Firm / Business : _____

*Address : _____

Postcode: _____ Tel.: _____

Source of Funds : Employment Business Savings / Inheritance Investment Proceeds Others, please specify : _____
 Source of Wealth : Employment Business Savings / Inheritance Investment Proceeds Others, please specify : _____

If own business, state the percentage of shareholdings / ownership: _____ Nature of Business : _____

Annual estimated income : Up to RM 50,000 RM 50,001 to RM 100,000 RM 100,001 to RM 300,000 Above RM 300,000

Family Particulars (Please provide details of your spouse and children) *Minimum one name

Name	Relationship	Date of Birth	NRIC / Passport / Birth Certificate No.	Name of Employer (if employed)

2. PARTICULARS OF JOINT APPLICANT / DESIGNATED SECOND ACCOUNT HOLDER

*Full Name (as per NRIC / Passport)

*Title : Mr Mrs Others, please specify: _____ *Date of Birth: _____ - _____ - _____

*NRIC No./Passport : _____ - _____ - _____ *E-mail: _____

*Gender : Male Female *Race: Malay Chinese Indian Others

*Nationality : Malaysian, Bumiputera Malaysian, Non-Bumiputera Non-Malaysian please specify : _____

3. CONTACT DETAILS

*Address : _____

*Postcode : _____ *E-mail : _____

*Tel No : _____ (House) _____ (Mobile)
 _____ (Office) _____ ext. _____ (Fax)

* Client's initial:



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4. BANKING CHARGES

Bank Name	Address / Branch	Account Name	Account Type	Account Number

5. ANNUAL INCOME OF SPOUSE (not applicable to Joint Account)

Up to RM 50,000 RM 50,0001 to RM 100,000 RM 100,001 to RM 300,000 Above RM 300,000

6. PARTICULARS OF INTRODUCER

*Full Name (as per NRIC / Passport)

*NRIC No./Passport: _____ - _____ - _____

*Tel No.: _____

*MR code : _____

*E-mail : _____

7. SOPHISTICATED INVESTOR DECLARATION (as defined under schedule 6 or 7 of the capital markets and services Act 2007)

I/We hereby confirm that I/we a m/are sophisticated investor(s)

Yes No

8. DOMESTIC CREDIT FACILITY DECLARATION

* I / We hereby declare that pursuant to “Domestic Ringgit Borrowing”, as defined under the Notice of Foreign Exchange Administration Rule of Bank Negara Malaysia (FEA Rule), we declare the following: -

I / We do not have any domestic borrowing ringgit credit facilities as defined under the Exchange Control Notices of Bank Negara Malaysia.

OR
 I / We have domestic ringgit credit facilities as defined under the Exchange Control Notices of Bank Negara Malaysia. However, We further declare that our investments in foreign currency assets does not exceed Ringgit Malaysia One Million (RM 1,000,000.00) per calendar year, and undertake to inform you if it is otherwise.

9. QUESTIONNAIRE

Do you understand the risks of investing equities, money market and fixed income securities and that it may incur losses? : Yes No

Berjaya Mutual only manages this Mandate on **Discretionary** basis : Noted & Agree

Do you have any pending litigations, disputed accounts, or other unresolved matters with any parties? : Yes No

If YES, please provide details : _____

Have you ever been subjected to any federal or state bankruptcy proceedings, receivership or similar proceedings (voluntarily or involuntarily) or been convicted of any offense other than traffic offence in Malaysia or elsewhere or are there any proceedings now pending which may lead to such a conviction :

Yes No

If YES, please provide details : _____

Purpose of transaction : Investing in Private Mandate Yes No



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**FOREIGN ACCOUNT
 TAX COMPLIANCE
 ACT(FATCA)**

10. FOREIGN ACCOUNT TAX COMPLIANCE ACT (“FATCA”) AND COMMON REPORTING STANDARDS (“CRS”)

In compliance with relevant tax authorities' requirement, Berjaya Mutual is obliged to collect certain information about each investor's tax arrangement. Please complete the sections below as directed and provide any document that is requested. Please note that we may be legally obliged to share this information, and other financial information with respect to the financial accounts to which this form relates to Inland Revenue Board of Malaysia (“IRBM”), who in turn may share the information with relevant tax authorities of other jurisdictions where you are a tax resident.

FATCA DECLARATION – First Applicant

* Are you a U.S. Citizen or Resident (including a green card holder) : Yes No

* Do you have U.S. passport : Yes No

* Is U.S. your country of birth : Yes No

* Do you hold a current U.S. residence or mailing address (including a U.S. post office box) : Yes No

* Do you have a current U.S. telephone number : Yes No

* Do you currently maintain any standing instructions to the U.S. : Yes No

* Do you currently assign power of attorney or signatory authority to a person within the U.S. : Yes No

* Do you currently have a “hold mail” or “in care of” address as your sole address : Yes No

* Do you currently file a tax return in U.S. : Yes No

U.S. TIN : _____

CRS DECLARATION OF TAX RESIDENCY – First Applicant

Are you a tax resident of Malaysia : Yes No

* Do you have tax residency outside Malaysia : Yes No

Country of tax residence : _____

TIN : _____

Country of tax residence : _____

TIN : _____

Country of tax residence : _____

TIN : _____

If no TIN available, please tick one of the following reasons:

- Country does not issue TIN.
- Country does not require the collection of TIN.
- TIN application in progress.
- Not required to register tax file.
- I am a housewife, househusband, student or retiree.
- Others, please specify: _____

FATCA DECLARATION – Second Applicant

Are you a U.S. Citizen or Resident (including a green card holder) : Yes No

Do you have U.S. passport : Yes No

Is U.S. your country of birth : Yes No

Do you hold a current U.S. residence or mailing address (including a U.S. post office box) : Yes No

Do you have a current U.S. telephone number : Yes No

Do you currently maintain any standing instructions to the U.S. : Yes No

Do you currently assign power of attorney or signatory authority to a person within the U.S. : Yes No

Do you currently have a “hold mail” or “in care of” address as your sole address : Yes No

Do you currently file a tax return in U.S. : Yes No

U.S. TIN : _____

* Client's initial: _____



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**FOREIGN ACCOUNT
 TAX COMPLIANCE
 ACT(FATCA)**

CRS DECLARATION OF TAX RESIDENCY – Second Applicant

Are you a tax resident of Malaysia : Yes No

Do you have tax residency outside Malaysia : Yes No

Country of tax residence :

TIN :

Country of tax residence :

TIN :

Country of tax residence :

TIN :

If no TIN available, please tick one of the following reasons:

- Country does not issue TIN.
- Country does not require the collection of TIN.
- TIN application in progress.
- Not required to register tax file.
- I am a housewife, houschusband, student or retiree.
- Others, please specify: _____

I / We acknowledge that the information contained in this form and information regarding my / our account(s) with you may be provided to IRBM and they may exchange this information with tax authorities of other countries pursuant to intergovernmental agreements to exchange financial account information.

I / We declare that all statements made in this declaration are, to the best of my / our knowledge and belief, correct and complete.

I/We undertake to advise Berjaya Mutual within 30 days of any change in circumstances which affects or causes the information contained herein to become incorrect or incomplete, and to provide Berjaya Mutual with a suitably updated self-certification within 30 days from such change with the supporting documents, as applicable.



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PROTECTION ACT NOTICE (PDPA)

11(a). PERSONAL DATA PROTECTION ACT NOTICE

In accordance with the Personal Data Protection Act 2010 ('PDPA') and our commitment to safeguard and protect our clients' personal data, this notice sets out the manner of how your personal data will be processed by Berjaya Mutual. We encourage you to periodically review this Notice on a regular basis for updates and changes as Berjaya Mutual reserves the right to amend this Notice from time to time.

WHAT KIND OF PERSONAL DATA WILL BE COLLECTED AND HOW DO WE COLLECT IT

Personal data which may be collected from you include your name, NRIC/Passport number, gender, addresses, contact numbers, email address, employment, financial information, as well as information on your spouse or immediate relatives and any other information that may be required by the regulatory such as the Securities Commission of Malaysia. These are collected through any of the following methods: -

- a. Personal data which are directly provided by you by way of application forms or agreements;
- b. Personal data may be obtained by Berjaya Mutual from publicly available sources;
- c. Personal data related to your transactions with us or our affiliates;
- d. Information that you have provided to us on our websites;
- e. From third parties such as credit reference agencies or from any other sources as Berjaya Mutual considers appropriate;
- f. Any other sources which you have given your consent to disclose information relating to you and/or where not otherwise restricted.

PROVISION OF INFORMATION

As a client, you have the right in deciding the information that you wish to provide, we may require you to provide us with the mandatory information which we may deem relevant from time to time to enable us to process your application and offer our facilities, products and services to you. If you choose not to provide the same, we may not be able to process and provide the facilities, products and services to you.

PURPOSE OF COLLECTING PERSONAL DATA

The personal data provided by you shall be used in the ordinary course of our business which may include but not limited to the following purposes:

- a. The processing of your application for our facilities, products and services, including identification verification;
- b. Assessing or verifying your credit worthiness (i.e.: ongoing credit worthiness)
- c. To manage and maintain your account(s) and/or investment(s) with us;
- d. To communicate or respond to your enquiries and resolving any services issues or complaints;
- e. To provide you with information on products and services offered by us and/or our business partners;
- f. For purposes of cross selling, marketing and promotions with our strategic partners;
- g. To comply with regulatory requirements and provide assistance to law enforcement agencies;
- h. For enforcement of our rights and obligations;
- i. Developing financial products and services;
- j. To improve and develop our products and services and quality assurance;
- k. To conduct internal activities including for audit, compliance and risk management purposes;
- l. To conduct anti-money laundering checks; for crime detection, prevention and prosecution; to comply with any sanction requirements; and
- m. Any other purposes as permitted by applicable law and for any other incidental and associated purposes relating to any of the above.

Berjaya Mutual retains personal data for as long as necessary as permitted by applicable law for its legitimate business purposes or otherwise destroyed and/or deleted from our records and systems in accordance with our retention policy in the event such date is no longer required for the said purposes.

DISCLOSURE OF YOUR PERSONAL DATA

Your personal data will not be disclosed to any third parties unless it is within the ambit of permitted disclosures under the prevailing laws/guidelines and/or you have consented to such disclosure. We may disclose your data include but not limited to the following third parties:

- a. Our agents, services providers, vendors and professional adviser acting on our behalf or appointed by us to act on our behalf;
- b. Our strategic partner outside Malaysia for the purposes of providing you services to trade in overseas securities if you choose so;
- c. Any corporations which may be associated with or related to Berjaya Mutual, including its holding, related and associated companies; Regulatory,
- d. government bodies or other authorities if required or authorised to do so to discharge any regulatory function under any law or in relation to any order or judgment of a court; and
- e. To our professional advisors including auditors, tax agents, solicitors, accountants and/or other agents in connection with your facilities, products and services.

SECURITY OF YOUR PERSONAL INFORMATION

- a. We will also ensure that reasonable steps are taken by the aforementioned categories of parties to protect or maintain confidentiality of your information disclosed to them.
- b. We regularly review and implement up-to-date technical and organisational security measures when processing your personal information.
- c. Employees of Berjaya Mutual are retained to handle the personal information securely and with strict confidentiality, failing which they may be subject to disciplinary action.

RIGHT OF ACCESS, OPT-OUT OF DISCLOSURE AND CORRECT PERSONAL DATA

You have the right to request for access to your personal data and if you wish to opt-out of disclosure of your personal data or request for updating/correction of your personal data held by IPAM, please submit your request in writing via post or email to: -



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**PERSONAL DATA
PROTECTION ACT
NOTICE (PDPA)**

a. **Mailing address :**
Berjaya Mutual Berhad
West Wing, Level 13,
Berjaya Times Square,
No.1, Jalan Imbi
55100 Kuala Lumpur

b. **Email address:**
enquiry_ipam@interpac.com.my

I / We hereby declare that I/we have read, understood and consented to the processing of my/our personal data in accordance with the Notice and Terms and Conditions herein.

11(b). NOTIS AKTA PERLINDUNGAN DATA PERIBADI

Selaras dengan Akta Perlindungan Data Peribadi 2010 (“PDPA”) dan komitmen kami untuk melindungi data peribadi pelanggan-pelanggan kami, Notis ini menetapkan cara bagaimana data peribadi anda akan diproses oleh Berjaya Mutual.

Kami menggalakkan anda menyemak Notis ini secara berkala untuk sebarang kemas kini dan perubahan kerana Berjaya Mutual berhak untuk meminda Notis ini dari semasa ke semasa.

JENIS-JENIS DATA PERIBADI YANG AKAN DIKUMPUL DAN BAGAIMANA IA DIKUMPUL

Data peribadi yang boleh dikumpul dari anda adalah termasuk nama, nombor NRIC/Pasport, jantina, alamat, nombor telefon, alamat e-mel, pekerjaan, maklumat kewangan, dan juga maklumat mengenai pasangan anda atau saudara-mara terdekat dan maklumat lain yang mungkin diminta oleh pemeraturan iaitu Suruhanjaya Sekuriti Malaysia. Ia dipungut melalui mana-mana kaedah berikut:-

- Data peribadi yang disediakan secara langsung oleh anda melalui sebarang borang permohonan atau perjanjian;
- Data peribadi boleh diperolehi oleh Berjaya Mutual daripada sumber-sumber lain yang boleh didapati secara umum;
- Data peribadi yang berkaitan dengan transaksi anda dengan kami atau sekutu-sekutu kami;
- Informasi yang anda telah diberikan kepada kami di laman web kami;
- Daripada pihak ketiga seperti agensi-agensi rujukan kredit atau daripada mana-mana sumber lain yang difikirkan sesuai oleh Berjaya Mutual ;
- Mana-mana sumber lain yang anda telah bersetuju untuk didedahkan maklumat-maklumat berkaitan dengan anda dan/atau di mana tidak dihadkan sebaliknya.

PERUNTUKAN MAKLUMAT

Sebagai pelanggan, anda mempunyai hak untuk menentukan maklumat yang anda ingin berikan, kami mungkin memerlukan anda untuk memberikan kami maklumat-maklumat mandatori yang mungkin dianggap berkaitan dari semasa ke semasa untuk membolehkan kami memproses permohonan anda dan menawarkan kemudahan-kemudahan, produk dan perkhidmatan kami kepada anda. Jika anda memilih untuk tidak memberikannya kepada kami, kami mungkin tidak dapat memproses dan menyediakan kemudahan-kemudahan, produk dan perkhidmatan itu kepada anda.

TUJUAN PENGAMBILAN DATA PERIBADI

Data peribadi yang diberikan oleh anda akan digunakan dalam urusan perniagaan kami yang mungkin meliputi maksud yang berikut:

- Pemrosesan permohonan anda untuk kemudahan-kemudahan, produk dan perkhidmatan kami, termasuk pengesahan pengenalan;
- Menilai atau mengesahkan maklumat kredit anda (iaitu maklumat kredit yang berterusan)
- Untuk mengurus dan mengekalkan akaun dan/atau pelaburan anda dengan kami;
- Untuk berkomunikasi atau bertindak balas terhadap pertanyaan-pertanyaan anda dan menyelesaikan sebarang isu-isu perkhidmatan atau aduan anda;
- Untuk memberikan anda maklumat mengenai produk dan perkhidmatan yang ditawarkan oleh kami dan/atau rakan-rakan kongsi perniagaan kami;
- Untuk tujuan jualan silang, pemasaran dan promosi dengan rakan-rakan kongsi strategik kami;
- Untuk mematuhi keperluan kawal selia dan menyediakan bantuan kepada agensi-agensi penguatkuasaan undang-undang;
- Bagi penguatkuasaan hak-hak dan kewajipan kami;
- Pembangunan produk dan perkhidmatan kewangan;
- Untuk memperbaiki dan membangunkan produk dan perkhidmatan kami dan jaminan kualiti;
- Untuk melaksanakan kegiatan-kegiatan dalaman termasuk untuk tujuan audit, pematuhan dan pengurusan risiko;
- Untuk menjalankan pemeriksaan pencegahan pengubahan wang haram; untuk pengesanan, pencegahan dan pendakwaan jenayah; untuk mematuhi mana-mana syarat sanksi; dan
- Sebarang tujuan-tujuan lain seperti yang dibenarkan oleh undang-undang dan untuk apa-apa tujuan-tujuan sampingan dan berkaitan lain berhubung dengan perkara-perkara di atas.

Berjaya Mutual akan mengekalkan data peribadi selama yang perlu seperti yang dibenarkan oleh undang-undang untuk tujuan perniagaan yang sah atau sebaliknya akan dimusnahkan dan/atau dipadamkan dari rekod-rekod dan sistem kami mengikut dasar pengendalian kami sekiranya data tersebut tidak lagi diperlukan bagitujuan tersebut.

PENDEDAHAN DATA PERIBADI ANDA

Maklumat peribadi anda tidak akan didedahkan kepada mana-mana pihak ketiga melainkan jika ia adalah dalam lingkungan pendedahan yang dibenarkan di bawah undang-undang yang wujud / garis panduan dan/ atau anda telah bersetuju dengan

pendedahan sedemikian. Kami mungkin mendedahkan data anda kepada pihak ketiga termasuk dan tidak terhad kepada seperti berikut:

- Ejen-ejen, pembekal-pembekal perkhidmatan dan penasihat-penasihat profesional kami yang bertindak bagi pihak kami atau dilantik oleh kami untuk bertindak bagi pihak kami;
- Rakan strategik kami di luar Malaysia untuk tujuan menyediakan anda perkhidmatan untuk berdagang dalam sekuriti-sekuriti di luar negara jika anda memilih sedemikian;
- Mana-mana syarikat semasa atau di masa hadapan yang boleh dikaitkan dengan atau berkaitan dengan Berjaya Mutual, termasuk wakil-wakil dan pejabat-pejabat cawangan dan wakil-wakil mereka, pegangan-pegangan, Syarikat Syarikat berkaitan dan syarikat-syarikat bersekutu Berjaya Mutual;



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NOTICE (PDPA)**

- d. Pemeraturan, badan-badan kerajaan atau pihak berkuasa yang lain jika diperlukan atau dibenarkan untuk berbuat demikian untuk menunaikan sebarang fungsi kawal selia di bawah mana-mana undang-undang atau yang berhubungan dengan sebarang perintah atau penghakiman mahkamah;
- e. Untuk penasihat-penasihat profesional kami termasuk juruaudit, ejen cukai, peguam, akauntan dan /atau ejen-ejen lain yang berkaitan dengan kemudahan-kemudahan, produk dan perkhidmatan anda.

SEKURITI MAKLUMAT PERIBADI ANDA

- a. Kami juga akan memastikan langkah-langkah munasabah akan diambil oleh kategori-kategori pihak tersebut di atas untuk melindungi atau mengekalkan kerahsiaan maklumat anda yang didedahkan kepada mereka;
- b. Kami dari masa ke semasa menyemak semula dan melaksanakan langkah keselamatan teknikal dan organisasi yang terkini semasa memproses maklumat peribadi anda.
- c. Pekerja-pekerja Berjaya Mutual adalah dilatih untuk mengendalikan maklumat peribadi dengan selamat dan dengan kesulitan yang ketat, di mana kegagalan membuat demikian mereka akan tertakluk kepada tindakan disiplin.

HAK AKSES, MENARIK DIRI DARIPADA PENDEDAHAN DAN PEMBETULAN DATA PERIBADI

Anda berhak untuk meminta akses kepada data peribadi anda dan jika anda berharap menarik diri daripada pendedahan data peribadi anda atau meminta untuk mengemaskini/membetulkan data peribadi anda yang dipegang oleh Berjaya Mutual, sila hantarkan permintaan anda secara bertulis melalui pos atau e-mel kepada:-

1. **Alamat surat-menyurat;**
Berjaya Mutual Berhad
West Wing, Level 13,
Berjaya Times Square,
No.1, Jalan Imbi
55100 Kuala Lumpur.
2. **E Mel:**
enquiry_ipam@interpac.com.my

Saya / Kami dengan ini menyatakan bahawa saya / kami telah membaca, memahami dan membenarkan pemprosesan data peribadi mengikut Notis dan Syarat-Syarat yang dinyatakan di dalam ini.

12. CLIENT DECLARATION AND AUTHORISATION

I/We declare that the above information is complete and true and that I/we have not withheld any material facts or information from Berjaya Mutual. I/We undertake to furnish Berjaya Mutual with such additional particular and information as Berjaya Mutual may require at any time and from time to time

- (a) A copy of Investment Management Agreement
- (b) A copy of Risk Disclosure Statement

I / We acknowledge that I / we have received: -

* Signature of First Applicant

Signature of Second Applicant

* Date:

Date:



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RISK DISCLOSURE STATEMENT

This brief statement does not disclose all of the risk and other significant aspects of investments. In light of the risks, you should undertake such transactions any if you understand in nature of investments into which you are entering and the extent of your exposure to risk. Investment is not suitable for many members of the public, you should consider carefully whether investment is appropriate for you in light of your experience, objectives, financial resources and other relevant circumstances.

Risk associated with investments

Market risks:

Any purchase of investments will have its market risk, which are susceptible to changing of market conditions.

Stock risks:

Any changing in business/shareholder of particular company may affect the price of stock.

Loan financing risks:

If you obtain a loan to finance your investments, you need to understand that:

- Borrowing increases the possibility for gain as well as losses.
- If your value of investment falls below a certain level, you may be asked by the financial institution to top up the collateral or reduce the outstanding loan amount to the required level.

Currency risks:

Your investment values are susceptible to changing in local currency value as well as changing in other currency that may affect your investments.

Manager’s risks:

The performance of your investments depends on the experience, knowledge, expertise and investment techniques adopted by the Investment Manager.

FOR OFFICE USE ONLY

Approved

Rejected

Checked by:

Approved by:

Date:

Date:

Client Code:

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Updated by: _____

Date: _____

Checked by: _____

Date: _____