Financial Profiling Form

(Individual / HUF / Sole Proprietorship / Partnership)



A GUIDE TO OUR SERVICES

- We, DBS Bank India Limited (DBS), a banking company Incorporated in India, provide certain services and market, distribute and refer certain third party products and services .

 The DBS Bank India Limited representative who has contacted you is authorised to shortlist

- The DBS Bank India Limited representative who has contacted you is authorised to shortlist products for you from our list of product providers.

 We have contractual arrangements with various third party product providers. For the list of such product providers, please contact your Relationship Manager/Service Manager. The information that you provide in this form will form the basis for us to shortlist investment products for your consideration. If you do not provide complete and accurate disclosures in the financial needs analysis process, any product that is short listed may not be appropriate for your needs and financial situation.

 Disclosure of Interests: We may receive different fees remuneration or benefits (including
- Disclosure of Interests: We may receive different fees, remuneration or benefits (including
- commissions / trailer fees / incentives) from product providers for marketing distributing & referring or selling their products to you. We and our affiliates (including the directors and/or employees) may also perform or seek to perform broking, investment banking and other financial services for the product providers.

 Reviews: We suggest you to review your financial objectives and situation on a regular basis (at least annually) or when significant changes in your economic situation and/or personal circumstances warrant it. Please inform our representative to update your records to ensure we have your updated information at all times.
- If you have any queries after the transaction, you may contact:
 - Your Relationship Manager Our Customer Service Manager

BRANCH DETAILS								
Branch Name:		Da	ate of	Submis	ssion:	DD	$\mathbb{M} \mathbb{M}$	Y
FIRST / SOLE APPLICANT								
*Category : Individual HUF Society Trust Club Associatio	n l	0	thers (Please sp	necify)			
Existing Account holders- CIF if any:	[_ `		 				
				L				
*Salutation : Mr Mrs Ms Dr Prof	–	ners (Please s	pecify)_	1 1	1 1	1 1	
*Name (Name as per bank record) : Frst Name Middle Name						Last Nar	ne	
2nd APPLICANT								
Existing Account holders- CIF if any:								
*Salutation : Mr Mrs Ms Dr Prof	Ot	hers (Please s	pecify)_				
*Name (Name as per bank record) : First Name						Last Nar	ne	1.1
3rd APPLICANT								
Existing Account holders- CIF if any:	1 1	1	l I	1 1	l I		1 1	
*Salutation : Mr Mrs Ms Dr Prof	ᆜ	hers (Please s	pecify)_				
*Name (Name as per bank record) : Frst Name Middle Name						Last Nar	ne	
Risk Profiling Questionnaire	Sc	ore	Ар	plicant 1	Ар	plicant 2	Арр	licant 3
1 For the financial goal(s) addressed today, how long can you stay invested?	Score A	Score B	Score A	Score B	Score A	Score B	Score A	Score B
A. Less than 1 year	5	NA						
B. 1 to less than 3 years C. 3 to 7 years	6 7	NA						
D. More than 7 years	8	NA NA						
What kind of instruments have you invested in before or are currently invested in? (you may select more than one)								
A Savings Accounts - Fixed Deposits	NA	NA						
B Life Insurance	N. A							
- General Insurance	NA	NA						
C. Liquid/Money Market Funds - Short Term Bonds	NA	NA						
- Debt/Income Funds - Capital Protection Oriented Funds	INA	INA						
D. Equity Funds								
Stocks PMS	NA	NA						
E Principal or Non Principal Protected Structures (e.g. Equity-linked Debentures)								
- Currency/Interest Rate Futures Trading - Commodities Trading	NA	NA						
- Private Equity Funds - Offshore Investment Products								
F. Leveraged Investment Products	NA	NA						
3 Which option below can accurately describe your investment knowledge and experience?								
A. I have no investments or insurance knowledge or experience B. Minimal: I have limited knowledge or experience of investments or insurance.	5 6	NA NA						
C. Moderate: I have knowledge or experience of any of the following: stocks, bond/debt funds, balanced funds	7	NA						
D. Good: Apart from the products like stock, bond/debt funds, balanced funds, I have knowledge or experience of any	8	NA						
of the following: equity funds, fund of funds, PMS E. Extensive: Apart from the products like equity funds, fund of funds, PMS, I have knowledge or experience of any of								
the following: private equity funds, principal and non principal protected structures, offshore investment products and leveraged investments, commodities/currency and interest rates futures.	9	NA						
How much average potential capital loss is acceptable to you in a negative return year?								
Higher returns generally means taking on greater risk?								
A 4% Minimal capital loss B 10% Small capital loss	0	20						
B 10% Small capital loss C 16% Moderate capital loss	8	27 32						
D 36% High capital loss	14	37						
E > 36% Significant capital loss	17	42						
Taking into account my overall cash flow and net worth, I feel secure about my financial situation over the next 12 months?								
A I disagree	5	NA						
B I somewhat agree	6	NA						
C Lagree D Lstrongly agree	7	NA						
3, 3	SUM A	NA SUM B						
Final Score		um of						

Risk Score Rang 15to 24-C1	Risk Profile		Description			
	Defensive	- Your priority is protecting your capital and	you are willing to accept minimal risks. In return, you	understand that you may receive minimal or low returns.		
25 to 29-C2	Conservative	Your priority is to maintain your investment c You would prefer to achieve <u>limited</u> returns	apital while seeking some investment returns.	risk-rated products which have simple structure are not		
30 to 34-C3	Moderate	exposed to high volatility or low liquidity. - Your goal is to obtain moderate investment re - You are willing to invest in moderately risk-	eturns, either through income or capital appreciation, ar	id are willing to take on moderate investment risk		
35 to 39-C4	Balanced	- You are willing to invest in moderately risk-rated products which are not exposed to high volatility or low liquidity. - Your goal is to obtain higher investment returns, either through income or capital appreciation, and are willing to take on higher investment risk. - You are willing to bear with more volatile returns, lower liquidity, and some risk of losing part of the principle investment.				
		- Your focus on maximizing investment returns, nower inquianty, and some risk or iosing part of the principle investment. - Your focus on maximizing investment returns opportunistically in an unconstrained manner, and you are willing to take on high levels of investment risk to do so.				
40 to 43 - C5	Dynamic	- You are comfortable with investing in comple low liquidity, and the possibility of losing part	or all of your capital.	nigher risk of loss, and you are prepared for volatile returns,		
		RISK	Profile Capping Selection for RPQ4	Conned Birk Brofile		
Capping of overall Risk F	Profiling Questionnai	ire (RPQ) scoringas part of the overall	4% Minimal capital loss	Capped Risk Profile Capped at C1 - Defensive		
		ponses selected by you for RPQ4 (relevance	10% Small capital loss	Capped at C2 - Conservative		
to average capital poten risk profile, against the c		nine the overall outcome of the client's ever is lower, as follows:	16% Moderate capital loss 36% High capital loss	Capped at C3 - Moderate Capped at C4 - Balanced		
			> 36% Significant capital loss	Capped at C4 - Dalanced Capped at C5 - Dynamic		
Who owns the fur	nds of this inve	stment? (you can select more than	one) Applicant 1	Applicant 2 Applicant 3		
Risk Profiling Que	stionnaire to b	pe done on:	Applicant 1	Applicant 2 Applicant 3		
Purpose & Reason	for opening th	e Account : Savings	Growth Family Mainter	nance Other		
Mode of Operatio	ns # Applicable for i	investment Single Join	t Either or Survivor	Former or survivor Anyone or Survivor		
Household Relation Financia	nship al Profiling Custo		es, Relationship Name:			
		CLIENT'S DECL	ARATION & WARRANTY			
andatory for all Cli	ents: (To be con	npleted by the client only)				
	-		on which may be unfamiliar to me/us, your rep	presentative has explained to me/us its meaning. OR		
Your representative	will complete the			the completed form has been checked by me and is		
」 accordance with my andatory for Joint↓		o be completed by the client only,)			
We	/_	/	declare that			
of the account to sig	is/are the	Owner(s) of the Funds and confirm that the	ne Financial Profiling has been done on the over	vner(s) of funds. We authorize any of the joint holder ne joint holder(s) shall bind us. We undertake that if t		
joint holder signing	the transaction forr			faction with the signatory and authorize him/her to si		
	ank India Limited to			e Bank on the terms and conditions set out hereinaft: knowledge that the value of the products is subject		
fluctuations and pas	t performance may	not be indication of the performance in fu				
•		tand the following:				
involved in invest Otherwise, I/we w	ting in that produ vill not invest in th	uct(s), and assess the suitability of the	ne product(s) against my/our risk appet to do so nonetheless, I/we will ensure tha	the investment product(s), the benefits and risks ite, financial means and investment objectives it I/we obtain relevant independent professiona		
I/We understand tha			ne the sale, referral or distribution of any pro	duct to any person while DRS Bank India Limited has		
against their risk app	nes relating to the so petite, financial me	sale, referral or distribution of products, in ans and investment objectives before mal	vestors should seek advice from their own fin- king any investment decision. Investors should	ancial adviser and assess the suitability of the product		
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I, independent profes: I/We hereby provide through SMS/Email.	nes relating to the specific, financial me referral or distribution of the specific and understative with the details in relative with the applicability with the applicability with the applicability with the applicability of the products opes not guaranter device to assist in the relative to assist in the relative understand in the specific different compet (We understand in the specific different compet (We understand in the clients of the clients who are the specific different compet (collectively "oscure of the Securit be suffered by me operation is single/reficial owner(s) & urither the clients who are the clients who are the clients who are without a specific different consent if the clients who are the clients	sale, referral or distribution of products, in ans and investment objectives before mal on as the basis, whether solely or otherwise ood and agree(s) to be bound by any am case of Joint Applicants, all the Applicant onship record of the Applicant (s) are true le laws as maybe in force from time to time of safety of capital or performance of my investments and does not result in a transactions, I/We will go through the ting schemes of various Mutual Funds that DBS Bank India Limited has a different above take any responsibility for the product so build take Independent professional advice is shall be governed by the Bank's prevailing www.dbsbank.in) and I declare that I have it can yapplication for internet banking we security Codes") relating to my access to extransaction of such non receipt or disclosu either or survivor/anyone or survivor) main litimately own or have effective control of the interested in availing Loan Against Security Bank India Limited does not take a ear availing third party product provider foot at DBS Bank India Limited does not take a ear availing third party product provider foot at DBS Bank India Limited does not take a ear availing third party product provider foot at DBS Bank India Limited does not take a ear availing third party product provider foot at DBS Bank India Limited does not take a ear availing third party product provider foot at DBS Bank India Limited does not take a ear availing third party product provider foot at DBS Bank India Limited does not take a ear availing third party product provider foot at DBS Bank India Limited does not take a ear availing third party product provider foot at DBS Bank India Limited does not take a ear availing third party product provider foot at DBS Bank India Limited does not take a ear availing third party product provider foot the party product p	vestors should seek advice from their own fining any investment decision. 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SELF CERTIFICATION ON USA CITIZENSHIP/ TAX RESIDENCY STATUS AND COMMON REPORTING STANDARD* INDIVIDUALS ONLY

1st Ap	oplicant
Tax Residency Status - USA (Please tick [∕] one of the boxes only)	TAX RESIDENCY STATUS - INDIA AND COUNTRIES OTHER THAN USA
For US federal income tax purposes, I represent and warrant that:	I am a Tax Resident ² of India only. I am a Tax Resident ² of India and (Pls Specify)
I am not a US person¹/Tax Resident²/ Green Card Holder. Please provide one of the following documents: • copy of non-US passport; or • non-US government issued identification.	I am a Tax Resident of india only. I am a Tax Resident of india and USA. Please provide one of the following documents: passport copy; Government issued identification Proof of residential address.
Additionally, if you were born in the US, please provide: • copy of certificate of loss of nationality of the US or • reasonable explanation that you do not have such a certificate:	Country of Tax Residency ² Tax Identification Number (TIN) ³ or equivalent If no TIN Available, enter Reason* & explanation A, B or C
I am a US person¹/ Tax Resident²/ Green Card Holder. Please provide your US Taxpayer Identification Number (TIN) or Social Security Number (SSN).	
I confirm that I am no longer a US person¹ Please provide one of the following documents: • copy of non-US passport; or • one of the following:	
a) copy of certificate of loss of nationality of the US or b) I-407 Form or c) reasonable explanation that you do not have such a certificate:	
2nd A	pplicant
Tax Residency Status - USA (Please tick [✓] one of the boxes only)	
For US federal income tax purposes, I represent and warrant that:	TAX RESIDENCY STATUS - INDIA AND COUNTRIES OTHER THAN USA
I am not a US person'/ Tax Resident ² / Green Card Holder. Please provide one of the following documents: • copy of non-US passport; or • non-US government issued identification.	I am a Tax Resident ² of India only. I am a Tax Resident ² of India and(Pls Specify) I am a Tax Resident ² of a country other than India and USA. Please provide one of the following documents: passport copy; Government issued identification Proof of residential address.
Additionally, if you were born in the US, please provide: • copy of certificate of loss of nationality of the US or • reasonable explanation that you do not have such a certificate:	Country of Tax Residency ² Tax Identification Number (TIN) ³ or equivalent If no TIN Available, enter Reason* & explanation A, B or C
I am a US person¹/ Tax Resident²/ Green Card Holder. Please provide your US Taxpayer Identification Number (TIN) or Social Security Number (SSN).	
I confirm that I am no longer a US person¹ Please provide one of the following documents: • copy of non-US passport; or • one of the following:	
a) copy of certificate of loss of nationality of the US or b) I-407 Form or c) reasonable explanation that you do not have such a certificate:	
2 4 4 0	pplicant
Tax Residency Status - USA (Please tick [/] one of the boxes only) For US federal income tax purposes, I represent and warrant that: I am not a US person'/ Tax Resident ² / Green Card Holder. Please provide one of the following documents: • copy of non-US passport; or • non-US government issued identification. Additionally, if you were born in the US, please provide:	TAX RESIDENCY STATUS - INDIA AND COUNTRIES OTHER THAN USA I am a Tax Resident² of India only. I am a Tax Resident² of India and(Pls Specify) I am a Tax Resident² of a country other than India and USA. Please provide one of the following documents: passport copy; Government issued identification Proof of residential address.
 copy of certificate of loss of nationality of the US or reasonable explanation that you do not have such a certificate: 	Country of Tax Residency ² Tax Identification Number (TIN) ³ or equivalent If no TIN Available, enter Reason* & explanation A, B or C
I am a US person¹/ Tax Resident²/ Green Card Holder. Please provide your US Taxpayer Identification Number (TIN) or Social Security Number (SSN).	A B C
I confirm that I am no longer a US person¹ Please provide one of the following documents: • copy of non-US passport; or	LABC
one of the following: a) copy of certificate of loss of nationality of the US or b) I-407 Form or c) reasonable explanation that you do not have such a certificate:	



Customer Care (24x7): India Helpline (Toll Free): 1800 209 4555 / 1800 103 9897,

International Helpline: +91-44-66854555 / +91-44-49021150

NOTE

- a) 'Definition of "US person": A citizen or permanent resident of the United States (e.g. US Green Card holder or someone who meets the requirements to be considered a resident under the 'substantial presence test'); US corporations, partnerships, estates and trusts; Any other person that is not a foreign (i.e. non-US) person (as defined under US federal tax law).
- b) Definition of "Tax Resident" Each jurisdiction has its own rules for defining tax residence, and jurisdictions have provided information on how to determine if you are resident in the jurisdiction on the following website: http://www.oecd.org/tax/automatic-exchange/crs-implementation-and-assistance/tax-residency/#d.en.347760\ In general, you will find that tax residence is the country/jurisdiction in which you live. Special circumstances may cause you to be resident elsewhere or resident in more than one country/jurisdiction at the same time (dual residency). For more information on tax residence, please consult your tax adviser or the information at the OECD automatic exchange of information portal mentioned above.
- c) A TIN is a unique combination of letters or numbers assigned by a jurisdiction to an individual & and is used to identify the individual for the purpose of administering tax laws of such jurisdiction.
- d) *Reasons: A I am resident of a country/jurisdiction which does not issue TIN to its residents. B I am otherwise unable to obtain a TIN or equivalent number (Please explain why you are unable to obtain a TIN in the above table if you have selected this reason). C TIN is not required. (Note: To be selected only if the domestic law of the relevant jurisdiction does not require the collection of the TIN issued by such jurisdiction.)

SELF CERTIFICATION

- 1. I certify that the information provided herein is true, complete and accurate. If any information herein changes or becomes inaccurate in any way, I shall immediately inform DBS Bank India Limited ("DBS") of such change or inaccuracy within 30 calendar days from the date I had knowledge of such change or inaccuracy. I undertake to promptly provide to DBS Bank India Limited such other information, documents or evidence which DBS Bank India Limited may require in connection with such change.
- 2. I consent to the collection, use, disclosure and processing of my personal data by DBS Bank India Limited for the purposes of this Certification.
- 3. I consent to DBS Bank India Limited disclosing any information herein (including providing this Certification and details of accounts held by me) to any third party including any Indian or overseas government authority for the purposes of confirming or investigating the content of this Certification.
- 4. For parent/guardian/trustee signing on behalf of a person under the age of 18 I/We warrant that I/we have the legal right (whether under statute, court order, instrument or otherwise) to sign this Certification, and have obtained that individual's prior consent to such collection, use, disclosure and processing of his/her personal data by DBS Bank India Limited for the purposes of this Certification. I/We consent on behalf of that individual to DBS Bank India Limited disclosure of his/her personal data in accordance with clause 3.
- 5. For person(s) signing on behalf of a mentally incapacitated person I/We warrant that I/we have the legal right (whether under statute, court order, instrument or otherwise) to sign this Certification, including consenting on behalf of that individual (i) to such collection, use, disclosure and processing of his/her personal data by DBS Bank India Limited for the purposes of this Certification; and (ii) to DBS Bank India Limited disclosure of his/her personal data in accordance with clause 3.

X	X	X	
1st Applicant Signature	2nd Applicant Signature	re 3rd Applicant Signature	
1) Please sign as per Bank's records. 2) Thumbprints must be affixed in the presence of a bank's fixed in t	nk staff.	Date : DDMMY	Υ

) If you are signing this form on behalf of a person per clause 4 or 5 above, please provide your name and NRIC/Passport number next to your signature/thumbprint.

FOR BANK USE ONLY				
Branch Name				
Attended by /CS (Signed in Presence of):	Name	Signature	DDMMYY	
IDS (ID Document Submitted):				
(1st Applicant)				
(2nd Applicant)				
(3rd Applicant)				
	ID Name	ID Number		
IDV (ID Document Verified By):	Name	Signature	DDMMYY	
SV (Signature Verified By):	Name	Signature	DDMMYY	

Profiler Proposal Financial Profiling form with T & C Debit Mandate Form & POA Identity Proof Address Proof

OPERATIONS CHECKLIST				
Doc Checked :	Doc Verified :	Pan verified on IT website:	Date :	
CIF Created :	CIF Verified :	CIF No. 1:		
		CIF No. 2:		
		CIF No. 3:	Date :	
Profiling Updated :	Profiling Authorized :	Signature Scanned :	Signature Verified :	
RM Name Updated :	RM Name Authorized :			
Conversion Tier ID :				

FPF_INDV / V.2_May 2	022
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ACKNOWLEDGMENT SLIP (To be handed over to Customer)					
We acknowledge the receipt of your Financial Profiling Form. The terms and conditions, features and charges with regard to your investment account opening request has been explained to you by the Your investment account will be set up subject to KYC checks.	relationship Manager.	Relationship Manager Details: Name Signature	Date: DDMMYY		

X