



User Guide

View/Edit Trustee-Documented Trusts

Estimated submission time required is about 5 minutes. Please have the following information ready before using the e-Service:

1. Your Singpass
2. The Reporting SGFI's Singapore Tax Reference Number
3. TDT PDF Form (where applicable)

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1.To view the list of Trustee-Documented Trusts

1. To view the list of Trustee-Documented Trusts

Step 1

- Log in via [myTax Portal](#) > Select More > AEOI > **View/Edit Trustee-Documented Trusts**

The screenshot displays the myTax Portal interface. At the top, it says "A Singapore Government Agency Website" and features the Inland Revenue Authority of Singapore logo. The main navigation bar includes "Tax Ref No.", "Email Us (myTax Mail)", "433 Notices/Letters", "Account", and "Logout". Below this, the "More" dropdown menu is open, showing options such as "View/ Update FI AEOI Profile", "View/ Update My Profile", "View/ Edit Trustee-Documented Trusts" (highlighted with a red box), "Submit CRS or FATCA Return", "View Submitted Financial Account Report", "View AEOI e-Service Transaction History", and "Apply to Deregister for AEOI". The page also shows a "Last login on Wednesday, 28 Jul 2021 3:22" message and a security notice: "myTax Portal is a secured, personalised service. Use the navigation options with IRAS, at your discretion." The text "Use the navigation" and "b you." is partially visible at the bottom.

Step 2

At View/ Edit Trustee-Documented Trust landing page,

Applicable for tax agents only:

- Select the appropriate entity ID type (e.g. ASGD, ITR, UEN-Business, UEN-Local Co, UEN-Others) and enter your client's tax reference number
- Click **"Next"**



If you are not a Tax Agent, skip step 2 and proceed to step 3.

Client Selection
for View/ Edit Trustee-Documented Trust

Continue with

Client Tax Ref No. ⓘ

UEN-LOCAL CO

NEXT

1. To view the list of Trustee-Documented Trusts

Step 3

To view the list of Trustee-Documented Trusts (TDTs) under the Financial Institution

- Under View By, select “Active TDTs” or “All TDTs”

View/ Edit Trustee-Documented Trusts

 [SAVE AS PDF/ PRINT](#)

This e-Service allows you to view and edit the records for trustee-documented trusts (TDTs).

Under CRS and FATCA, a TDT is a Non-Reporting Financial Institution where the trustee (which is a Reporting Financial Institution) reports all information with respect to the Reportable Accounts of the TDT. A trustee that agrees to undertake CRS and FATCA reporting on behalf of a TDT has to maintain the record of the TDT in the list below.

View by

Active TDTs All TDTs

1 - 16 of 16 Record(s)

TDT Ref No.	Name of Trust	Effective Reporting Period (CRS)	Effective Reporting Period (FATCA)	Action
2100011178	MINT TRUST	2019 -	2019 -	EDIT
2100011176	COMO TRUST	2019 -	2019 -	EDIT
2000011151	TRUST DEF	2018 - 2019	2020 -	EDIT
2000011150	HAPPY TRUST	2020 -	2020 -	EDIT

[UPLOAD LIST](#)

[ADD TDT](#)

2. To create Trustee-Documented Trusts

2. To create Trustee-Documented Trusts

Step 1

- Log in via [myTax Portal](#) > Select More > AEOI > **View/Edit Trustee-Documented Trusts**

The screenshot displays the myTax Portal interface. At the top, it says "A Singapore Government Agency Website" and features the Inland Revenue Authority of Singapore logo. The main navigation bar includes "Tax Ref No.", "Email Us (myTax Mail)", "433 Notices/Letters", "Account", and "Logout". Below this, the "More" dropdown menu is open, showing options such as "View/ Update FI AEOI Profile", "View/ Update My Profile", "View/ Edit Trustee-Documented Trusts" (highlighted with a red box), "Submit CRS or FATCA Return", "View Submitted Financial Account Report", "View AEOI e-Service Transaction History", and "Apply to Deregister for AEOI". The page also shows a "Last login on Wednesday, 28 Jul 2021 3:22" and a message stating "myTax Portal is a secured, personalised service for you. Use the navigation menu to access the services you require. For more information on the services available, visit the myTax Portal website." The text "ctions with IRAS, at your" and "b you." is partially visible on the right side of the page.

Step 2

At View/ Edit Trustee-Documented Trust landing page,

Applicable for tax agents only:

- Select the appropriate entity ID type (e.g. ASGD, ITR, UEN-Business, UEN-Local Co, UEN-Others) and enter your client's tax reference number
- Click **“Next”**



If you are not a Tax Agent, skip step 2 and proceed to step 3.

Client Selection
for View/ Edit Trustee-Documented Trust

Continue with

Client Tax Ref No. ⓘ

UEN-LOCAL CO

NEXT

2. To create Trustee-Documented Trusts

Step 3

- You can create TDTs via 2 methods:
 - Create an individual TDT record (Steps 4a – 4d); or
 - Create multiple TDT records using a PDF form (Steps 5a – 5d)



Processing

- For individual online updates to TDTs, all changes will be effected immediately
- For updating/creating of multiple TDT records using a PDF form, the request will take about 2 to 3 working days to process. Once the request is processed, IRAS will send an email to the RSGFI's POC and other authorised users (who are subscribers of the email alert) to inform them to log in to myTax Portal to view the processing results via the View AEOI Notices/Letters e-Service

View/ Edit Trustee-Documented Trusts

[SAVE AS PDF/ PRINT](#)

This e-Service allows you to view and edit the records for trustee-documented trusts (TDTs).

Under CRS and FATCA, a TDT is a Non-Reporting Financial Institution where the trustee (which is a Reporting Financial Institution) reports all information with respect to the Reportable Accounts of the TDT. A trustee that agrees to undertake CRS and FATCA reporting on behalf of a TDT has to maintain the record of the TDT in the list below.

View by

Active TDTs All TDTs

1 - 16 of 16 Record(s)

TDT Ref No.	Name of Trust	Effective Reporting Period (CRS)	Effective Reporting Period (FATCA)	Action
2100011178	MINT TRUST	2019 -	2019 -	EDIT
2100011176	COMO TRUST	2019 -	2019 -	EDIT
2000011151	TRUST DEF	2018 - 2019	2020 -	EDIT
2000011150	HAPPY TRUST	2020 -	2020 -	EDIT

[UPLOAD LIST](#)

[ADD TDT](#)

2. To create Trustee-Documented Trusts

Step 4(a)

- To create an individual TDT record:
 - Under the selected TDT, click “**Edit**”



Specifically for **FATCA**, note that Trustee GIIN must be declared in the View/Update FI AEOI Profile e-Service before FIs can create TDTs for FATCA reporting



To create multiple TDT records, please proceed to **Step 5(a)**.

View/ Edit Trustee-Documented Trusts

[SAVE AS PDF/ PRINT](#)

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Under CRS and FATCA, a TDT is a Non-Reporting Financial Institution where the trustee (which is a Reporting Financial Institution) reports all information with respect to the Reportable Accounts of the TDT. A trustee that agrees to undertake CRS and FATCA reporting on behalf of a TDT has to maintain the record of the TDT in the list below.

View by

Active TDTs All TDTs

1 - 16 of 16 Record(s)

TDT Ref No.	Name of Trust	Effective Reporting Period (CRS)	Effective Reporting Period (FATCA)	Action
2100011178	MINT TRUST	2019 -	2019 -	EDIT
2100011176	COMO TRUST	2019 -	2019 -	EDIT
2000011151	TRUST DEF	2018 - 2019	2020 -	EDIT
2000011150	HAPPY TRUST	2020 -	2020 -	EDIT

[UPLOAD LIST](#)

[ADD TDT](#)

2. To create Trustee-Documented Trusts

Step 4(b)

- Input the Name of TDT and its Singapore Tax Reference Number (if applicable)
- Enter the Effective Reporting Year for CRS and/or FATCA



The Effective Reporting Year is the first calendar year in which the TDT becomes a Reporting Singaporean Financial Institution (SGFI) for CRS/FATCA purposes and is subject to the reporting and due-diligence requirements of CRS/FATCA. For example, if the TDT falls within the definition of a Reporting SGFI for CRS purposes in 2017, the Effective Reporting Year for CRS would be 2017.

- Click **“Save”**

Add Trustee-Documented Trust (TDT)

[SAVE AS PDF/ PRINT](#)

Details of TDT

Name of TDT *

Singapore Tax Ref No.

Select

Effective Reporting Period

CRS Effective Reporting Year

From

YYY

To

YYY

FATCA Effective Reporting Year ⓘ

From

YYY

To

YYY

CANCEL

SAVE

Step 4(c)

- Click on **“Yes”** If you wish to save your request or click on **“No”** to cancel

The screenshot shows a web form for creating a Trustee-Documented Trust (TDT). The form fields are as follows:

- Name of TDT:** MINT TRUST
- TDT Ref No.:** 2100011178
- Singapore Tax Ref No.:** A dropdown menu with 'Select' and a small downward arrow.
- Effective Reporting Period:** A section with two rows of date pickers.
- CRS Effective Reporting Year:** A section with two rows of date pickers.

The 'Effective Reporting Period' section has the following values:
Row 1: From 2019 To YYYY
Row 2: Reporting Year ⓘ To 2020

The 'CRS Effective Reporting Year' section has the following values:
Row 1: From 2019 To YYYY
Row 2: Reporting Year ⓘ To 2020

A white dialog box with a blue border is overlaid on the form. It contains the following text and buttons:
Title: Save
Text: Confirm save?
Buttons: NO (white with black border), YES (orange)

- Upon successful submission of your request to add the TDT, you will be brought to the **Acknowledgement Page**.



For individual online updates to TDTs, all changes will be effected immediately, and a copy of the Acknowledgement Page will be saved in View AEOI Notices/Letters e-Service

View/ Edit Trustee-Documented Trust

 [SAVE AS PDF/ PRINT](#)

Acknowledgement

Successful Submission

Your request to add the Trustee-Documented Trust information has been submitted.

Name	XXX	Tax Ref No.	<input type="text"/>
Acknowledgement No.	412897	Date/ Time	28 Jul 2021 5:28 PM
Name of Trust	TRUST EFG		

2. To create Trustee-Documented Trusts

Step 5(a)

- To create multiple TDT records using a PDF form. The PDF form is available [here](#).
- Ensure that the PDF Form is completed and click **“Upload List”**



Specifically for **FATCA**, note that Trustee GIIN must be declared in the View/Update FI AEOI Profile e-Service before FIs can create TDTs for FATCA reporting

View/ Edit Trustee-Documented Trusts

[SAVE AS PDF/ PRINT](#)

This e-Service allows you to view and edit the records for trustee-documented trusts (TDTs).

Under CRS and FATCA, a TDT is a Non-Reporting Financial Institution where the trustee (which is a Reporting Financial Institution) reports all information with respect to the Reportable Accounts of the TDT. A trustee that agrees to undertake CRS and FATCA reporting on behalf of a TDT has to maintain the record of the TDT in the list below.

View by

Active TDTs All TDTs

1 - 16 of 16 Record(s)

TDT Ref No.	Name of Trust	Effective Reporting Period (CRS)	Effective Reporting Period (FATCA)	Action
2100011178	MINT TRUST	2019 -	2019 -	EDIT
2100011176	COMO TRUST	2019 -	2019 -	EDIT
2000011151	TRUST DEF	2018 - 2019	2020 -	EDIT
2000011150	HAPPY TRUST	2020 -	2020 -	EDIT

[UPLOAD LIST](#)

[ADD TDT](#)

2. To create Trustee-Documented Trusts

Step 5(b)

- Upload the completed PDF Form (Max. File Size 2MB)
- Click **“Proceed”**

Upload List of Trustee-Documented Trusts

 SAVE AS PDF/ PRINT

This feature allows an FI to create or update multiple TDT records using a PDF Form. The PDF Form is available [here](#).

Required Document*

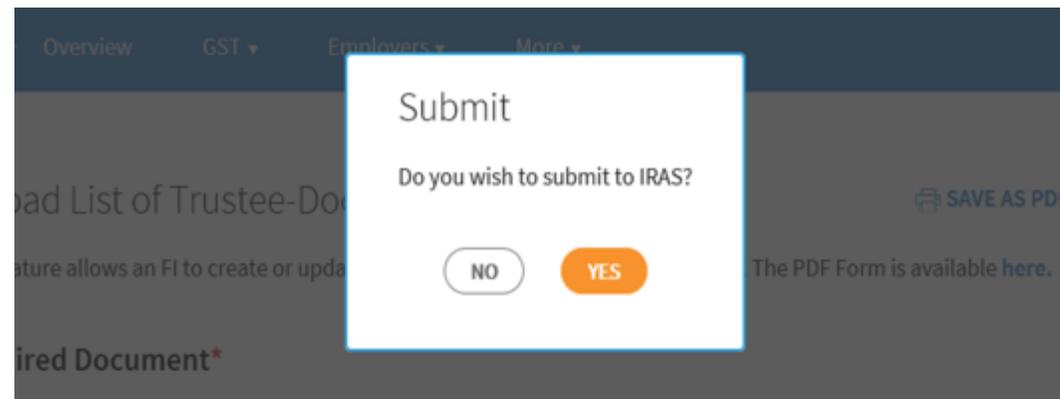
Type of Document	Details	Actions
List of TDTs		<p>SELECT FILE</p> <p>File Type Allowed pdf Maximum File Size 2 MB</p>

BACK

PROCEED

Step 5(c)

- Click on **“Yes”** if you wish to submit the PDF form or click on **“No”** to cancel



- Upon successful submission of your PDF form, you will be brought to the **Acknowledgement Page**.



It will take about 2 to 3 working days for the request to be processed. Once the request is processed, IRAS will send an email to the RSGFI's POC and other authorised users (who are subscribers of the email alert) to inform the person to log in to myTax Portal to view the processing results via View AEOI Notices/Letters e-Service.

View/ Edit Trustee-Documented Trust

Acknowledgement

Successful Submission

Your request to add/ edit the Trustee-Documented Trusts information has been submitted.

Name	XXX	Tax Ref No.	[REDACTED]
Acknowledgement No.	412070	Date/ Time	16-Jun-2021 10:46 AM

Submitted Document

Type of Document	File Name
List of TDTs	TDT_Update_Form_v1.0.pdf

3. To edit/ terminate Trustee-Documented Trusts

3. To edit/ terminate Trustee-Documented Trusts

Step 1

- Log in via [myTax Portal](#) > Select More > AEOI > **View/Edit Trustee-Documented Trusts**

The screenshot displays the myTax Portal interface. At the top, it says "A Singapore Government Agency Website" and features the Inland Revenue Authority of Singapore logo. The main navigation bar includes "Tax Ref No.", "Email Us (myTax Mail)", "433 Notices/Letters", "Account", and "Logout". Below this, the "More" dropdown menu is open, showing options such as "View/ Update FI AEOI Profile", "View/ Update My Profile", "View/ Edit Trustee-Documented Trusts" (highlighted with a red box), "Submit CRS or FATCA Return", "View Submitted Financial Account Report", "View AEOI e-Service Transaction History", and "Apply to Deregister for AEOI". The page also shows a "Last login on Wednesday, 28 Jul 2021 3:22" message and a security notice: "myTax Portal is a secured, personalised service. Use the navigation options with IRAS, at your discretion." The text "Use the navigation" and "b you." is partially visible at the bottom.

Step 2

At View/ Edit Trustee-Documented Trust landing page,

Applicable for tax agents only:

- Select the appropriate entity ID type (e.g. ASGD, ITR, UEN-Business, UEN-Local Co, UEN-Others) and enter your client's tax reference number
- Click **"Next"**



If you are not a Tax Agent, skip step 2 and proceed to step 3.

Client Selection
for View/ Edit Trustee-Documented Trust

Continue with

Client Tax Ref No. ⓘ

UEN-LOCAL CO

NEXT

3. To edit/ terminate Trustee-Documented Trusts

Step 3

- You can edit/ terminate TDTs via 2 methods:
 - Edit/ terminate individual TDT record (Steps 4a – 4d); or
 - Edit/ terminate multiple TDT records using a PDF form (Steps 5a – 5d)



Processing

- For individual online updates to TDTs, all changes will be effected immediately
- For updating/creating of multiple TDT records using a PDF form, the request will take about 2 to 3 working days to process. Once the request is processed, IRAS will send an email to the RSGFI's POC and other authorised users (who are subscribers of the email alert) to inform them to log in to myTax Portal to view the processing results via the View AEOI Notices/Letters e-Service

View/ Edit Trustee-Documented Trusts

SAVE AS PDF/ PRINT

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View by

- Active TDTs All TDTs

1 - 16 of 16 Record(s)

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2100011178	MINT TRUST	2019 -	2019 -	EDIT
2100011176	COMO TRUST	2019 -	2019 -	EDIT
2000011151	TRUST DEF	2018 - 2019	2020 -	EDIT
2000011150	HAPPY TRUST	2020 -	2020 -	EDIT

[UPLOAD LIST](#)

[ADD TDT](#)

3. To edit/ terminate Trustee-Documented Trusts

Step 4(a)

- To edit/terminate individual TDT record:
 - Under the selected TDT, click “**Edit**”



To edit/ terminate multiple TDT records, please proceed to **Step 5(a)**.

View/ Edit Trustee-Documented Trusts

 [SAVE AS PDF/ PRINT](#)

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Under CRS and FATCA, a TDT is a Non-Reporting Financial Institution where the trustee (which is a Reporting Financial Institution) reports all information with respect to the Reportable Accounts of the TDT. A trustee that agrees to undertake CRS and FATCA reporting on behalf of a TDT has to maintain the record of the TDT in the list below.

View by

Active TDTs All TDTs

1 - 16 of 16 Record(s)

TDT Ref No.	Name of Trust	Effective Reporting Period (CRS)	Effective Reporting Period (FATCA)	Action
2100011178	MINT TRUST	2019 -	2019 -	EDIT
2100011176	COMO TRUST	2019 -	2019 -	EDIT
2000011151	TRUST DEF	2018 - 2019	2020 -	EDIT
2000011150	HAPPY TRUST	2020 -	2020 -	EDIT

[UPLOAD LIST](#)

[ADD TDT](#)

Step 4(b)

- Input the last Effective Reporting Year for CRS and/or FATCA respectively
- Click “Save”

Edit Trustee-Documented Trust (TDT)

[SAVE AS PDF/ PRINT](#)

Details of TDT

Name of TDT

MINT TRUST

TDT Ref No.

2100011178

Singapore Tax Ref No.

Select

Effective Reporting Period

CRS Effective Reporting Year

From

2019

To

YYYY

FATCA Effective Reporting Year ⓘ

From

2019

To

YYYY

CANCEL

SAVE

Step 4(c)

- Click on “Yes” If you wish to save your edits or click on “No” to undo the edits

Name of TDT

MINT TRUST

TDT Ref No.

2100011178

Singapore Tax Ref No.

Select

Effective Reporting Period

CRS Effective Reporting Year

From

2019

To

YYYY

Save

Confirm save?

NO

YES

Reporting Year ⓘ

To

2020

3. To edit/ terminate Trustee-Documented Trusts

- Upon successful submission of your request to terminate the TDT, you will be brought to the **Acknowledgement Page**.



For individual online updates to TDTs, all changes will be effected immediately, and a copy of the Acknowledgement Page will be saved in View AEOI Notices/Letters e-Service.

View/ Edit Trustee-Documented Trust

SAVE AS PDF/ PRINT

Acknowledgement

Successful Submission

Your request to edit the Trustee-Documented Trust information has been submitted.

Name	XXX	Tax Ref No.	<input type="text"/>
Acknowledgement No.	412894	Date/ Time	28 Jul 2021 3:56 PM
Name of Trust	MINT TRUST		

3. To edit/ terminate Trustee-Documented Trusts

Step 5(a)

- To edit/ terminate multiple TDT records using a PDF form. The PDF form is available [here](#).
- Ensure that the PDF Form is completed and click **“Upload List”**

View/ Edit Trustee-Documented Trusts

 [SAVE AS PDF/ PRINT](#)

This e-Service allows you to view and edit the records for trustee-documented trusts (TDTs).

Under CRS and FATCA, a TDT is a Non-Reporting Financial Institution where the trustee (which is a Reporting Financial Institution) reports all information with respect to the Reportable Accounts of the TDT. A trustee that agrees to undertake CRS and FATCA reporting on behalf of a TDT has to maintain the record of the TDT in the list below.

View by

Active TDTs All TDTs

1 - 16 of 16 Record(s)

TDT Ref No.	Name of Trust	Effective Reporting Period (CRS)	Effective Reporting Period (FATCA)	Action
2100011178	MINT TRUST	2019 -	2019 -	EDIT
2100011176	COMO TRUST	2019 -	2019 -	EDIT
2000011151	TRUST DEF	2018 - 2019	2020 -	EDIT
2000011150	HAPPY TRUST	2020 -	2020 -	EDIT

[UPLOAD LIST](#)

[ADD TDT](#)

3. To edit/ terminate Trustee-Documented Trusts

Step 5(b)

- Upload the completed PDF Form (Max. File Size 2MB)
- Click **“Proceed”**

Upload List of Trustee-Documented Trusts

 SAVE AS PDF/ PRINT

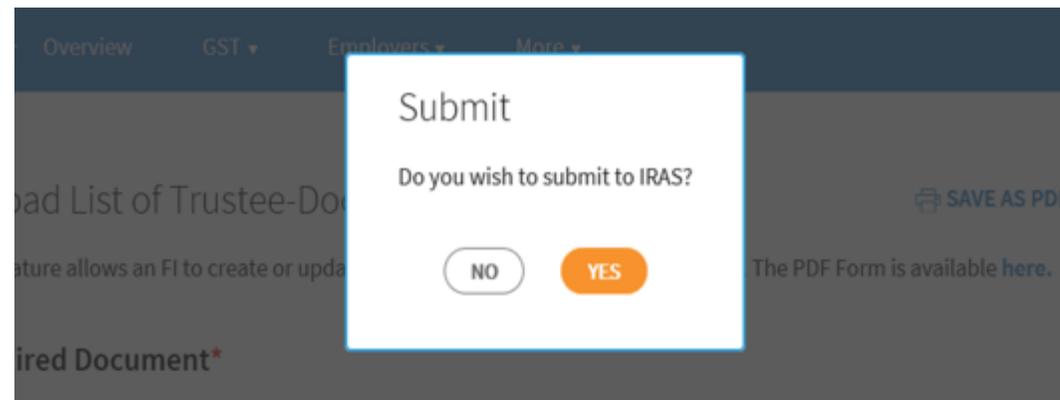
This feature allows an FI to create or update multiple TDT records using a PDF Form. The PDF Form is available [here](#).

Required Document*

Type of Document	Details	Actions
List of TDTs		<input type="button" value="SELECT FILE"/> File Type Allowed pdf Maximum File Size 2 MB

Step 5(c)

- Click on **“Yes”** if you wish to submit the PDF form or click on **“No”** to cancel



- Upon successful submission of your PDF form, you will be brought to the **Acknowledgement Page**.



It will take about 2 to 3 working days for the request to be processed. Once the request is processed, IRAS will send an email to the RSGFI's POC and other authorised users (who are subscribers of the email alert) to inform them to log in to myTax Portal to view the processing results via View AEOI Notices/Letters e-Service.

View/ Edit Trustee-Documented Trust

Acknowledgement

Successful Submission

Your request to add/ edit the Trustee-Documented Trusts information has been submitted.

Name	XXX	Tax Ref No.	[REDACTED]
Acknowledgement No.	412070	Date/ Time	16-Jun-2021 10:46 AM

Submitted Document

Type of Document	File Name
List of TDTs	TDT_Update_Form_v1.0.pdf

Published by
Inland Revenue Authority of Singapore

Published on 4 Jan 2022

The information provided is intended for better general understanding and is not intended to comprehensively address all possible issues that may arise. The contents are correct as at 4 Jan 2022 and are provided on an “as is” basis without warranties of any kind. IRAS shall not be liable for any damages, expenses, costs or loss of any kind however caused as a result of, or in connection with your use of this user guide.

While every effort has been made to ensure that the above information is consistent with existing policies and practice, should there be any changes, IRAS reserves the right to vary its position accordingly.

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