



User Guide

View/Update FI AEOI Profile

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

Step 1

- Log in via [myTax Portal](#) > Select More > AEOI > **View/Update FI AEOI Profile**



Third party agents can view the FI AEOI Profile but will not be able to update the profile information.

The screenshot displays the myTax Portal interface for the Inland Revenue Authority of Singapore. The user is logged in as 'Tax Ref ID: 200999027D'. The navigation menu includes 'Overview', 'Employers', and 'More'. The 'More' menu is expanded, showing options under 'AEOI', 'Government Payout', and 'Account'. The 'View/Update FI AEOI Profile' option is highlighted with a red box.

INLAND REVENUE AUTHORITY OF SINGAPORE

Tax Ref ID: 200999027D

Email Us (myTax Mail)

354 Notices/Letters

Account

Logout

Overview Employers More

Last login on Wednesday, 14 Jul 2021 5:44

AEOI

View/ Update FI AEOI Profile

View/ Update My Profile

View/ Edit Trustee-Documented Trusts

Submit CRS or FATCA Return

View Submitted Financial Account Report

View AEOI e-Service Transaction History

Apply to Deregister for AEOI

Government Payout

View Jobs Growth Incentive (JGI) Breakdown

myTax Portal is a secured, personalised service for you. Use the navigation menu to access the services available to you.

Step 2

At View/Update FI AEOI Profile 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 Profile Management

Continue with

Client Tax Ref No. 

UEN-LOCAL CO 

NEXT

Step 3**At View/Update FI AEOI Profile landing page,**

- The FI's current CRS and FATCA status will be displayed on this page
- You may edit the following fields if there has been a change:

CRS

- Type of Financial Institution

FATCA

- Type of Financial Institution
- FI's Global Intermediary Identification Number (GIIN)
- Sponsor's GIIN
- Trustee's GIIN

View/Update Financial Institution AEOI Profile

[SAVE AS PDF/PRINT](#)

Financial Institution (FI) Information

Tax Ref No.:	
Name	XXX

Registered for CRS	Yes
Type(s) of Financial Institution(s)*	
<input type="checkbox"/> Depository Institution	
<input checked="" type="checkbox"/> Investment Entity	
<input checked="" type="checkbox"/> Custodial Institution	
<input type="checkbox"/> Specified Insurance Company	
First Reporting Year	2017
Effective Date From	01 Jul 2017

Provided FATCA Registration Information	Yes
Type(s) of Financial Institution(s)*	
<input type="checkbox"/> Depository Institution	
<input checked="" type="checkbox"/> Investment Entity	
<input type="checkbox"/> Custodial Institution	
<input type="checkbox"/> Specified Insurance Company	
First Reporting Year	2015
FI's GIIN* ⓘ	111111.9027D.LE.702
Sponsor's GIIN ⓘ	XXXXXXXXXXXXXX.XXX
Trustee's GIIN ⓘ	111111.9027D.SP.702
Effective Date From	01 Jul 2017

RESET

SAVE

Step 3 (Cont'd)



Definitions of the 3 types of GIIN:

- **FI's GIIN**

The GIIN is a unique identification number that the entity received from the US Internal Revenue Service after it had registered to be a Foreign Financial Institution for FATCA. If the entity is a Sponsored Closely Held Investment Vehicle, please provide the GIIN of its Sponsoring Entity here too.

- **Sponsor's GIIN**

If the entity has a Sponsoring Entity that has agreed to assume the FATCA reporting obligations on the entity's behalf, please provide the GIIN of the Sponsoring Entity here.

- **Trustee's GIIN**

This is the GIIN assigned to the Reporting SGFI that undertakes the FATCA due-diligence and reporting obligations on behalf of trustee-documented trust(s). Please do not enter the GIIN that the Reporting SGFI receives when it registers itself with the US IRS as a Participating Foreign Financial Institution (PFFI) or Registered Deemed-Compliant FFI (RDCFFI).

View/ Update Financial Institution AEOI Profile

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Financial Institution (FI) Information

Tax Ref No.	
Name	XXX
Registered for CRS	Yes
Type(s) of Financial Institution(s)*	<input type="checkbox"/> Depository Institution <input checked="" type="checkbox"/> Investment Entity <input checked="" type="checkbox"/> Custodial Institution <input type="checkbox"/> Specified Insurance Company
First Reporting Year	2017
Effective Date From	01 Jul 2017
Provided FATCA Registration Information	Yes
Type(s) of Financial Institution(s)*	<input type="checkbox"/> Depository Institution <input checked="" type="checkbox"/> Investment Entity <input type="checkbox"/> Custodial Institution <input type="checkbox"/> Specified Insurance Company
First Reporting Year	2015
FI's GIIN* ⓘ	111111.9027D.LE.702
Sponsor's GIIN ⓘ	XXXXXXXXXXXXXXX
Trustee's GIIN ⓘ	111111.9027D.SP.702
Effective Date From	01 Jul 2017

RESET

SAVE

Step 4

- Click “Save”

View/ Update Financial Institution AEOI Profile

[SAVE AS PDF/ PRINT](#)

Financial Institution (FI) Information

Tax Ref No	
Name	XXX

Registered for CRS	Yes
Type(s) of Financial Institution(s)*	
<input type="checkbox"/> Depository Institution	
<input checked="" type="checkbox"/> Investment Entity	
<input checked="" type="checkbox"/> Custodial Institution	
<input type="checkbox"/> Specified Insurance Company	
First Reporting Year	2017
Effective Date From	01 Jul 2017

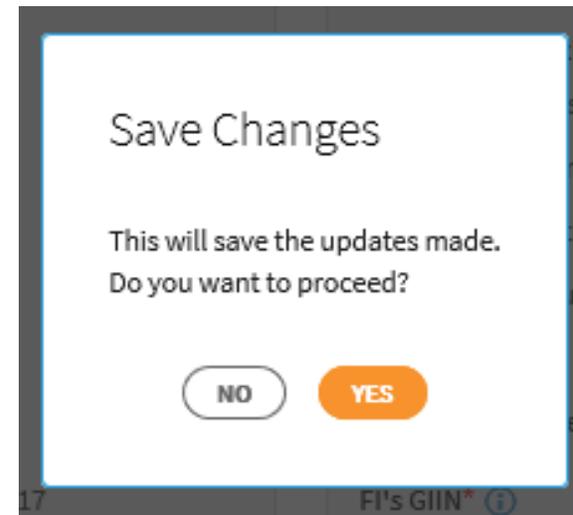
Provided FATCA Registration Information	Yes
Type(s) of Financial Institution(s)*	
<input type="checkbox"/> Depository Institution	
<input checked="" type="checkbox"/> Investment Entity	
<input type="checkbox"/> Custodial Institution	
<input type="checkbox"/> Specified Insurance Company	
First Reporting Year	2015
FI's GIIN* ⓘ	111111.9027D.LE.702
Sponsor's GIIN ⓘ	XXXXXXXXXXXXXXXXXX
Trustee's GIIN ⓘ	111111.9027D.SP.702
Effective Date From	01 Jul 2017

RESET

SAVE

Step 5

- Click **“Yes”** if you wish to save the updates made or click **“No”** to cancel



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



Changes made to FI AEOI Profile will be effected immediately, and a copy of the Acknowledgement Page will be saved in View AEOI Notices/Letters e-Service.

Acknowledgement

Successful Update

The financial institution's AEOI profile has been updated.

Name	XXX	Tax Ref No.	
Acknowledgement No.	412968	Date/ Time	30 Jul 2021 5:16 PM

Requestor's Details

Name of Requestor	XXX	Designation	TEST_ENTITY1
Contact No.		Email Address	

You updated the following details:

Type(s) of Financial Institution(s) - CRS	Custodial Institution	-Removed-
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Please print a copy of this acknowledgement page for your records.

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