Adding a beneficiary

A beneficiary = the recipient you are sending money to

1 Create a new beneficiary

Welcome to your World Account

Your Available Balances

GBP Account (1)	Total GBP: 0 ⌃
GBP GBP account	0

USD Accounts (2)	Total USD: 0.41 ⌃
USD USD account	0.29
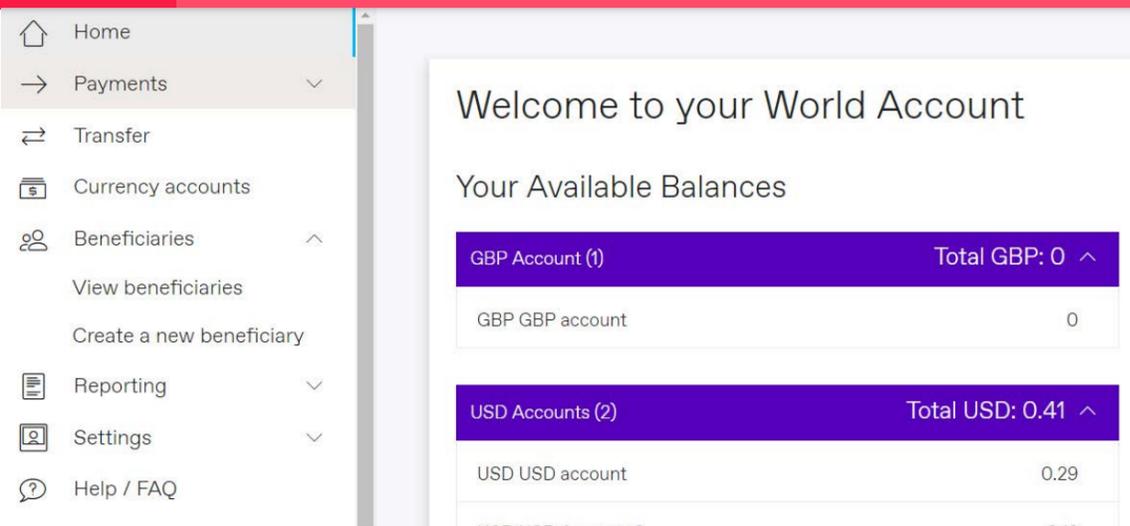
Home
Payments ⌄
Transfer
Currency accounts
Beneficiaries ⌃
   View beneficiaries
   Create a new beneficiary
Reporting ⌄
Settings ⌄
Help / FAQ

Click on 'Beneficiaries', and select 'Create a new beneficiary' on the left-hand menu.

2 Add beneficiary details

Create beneficiary ① ② ③

① Beneficiary details

Who do you want to send money to?
- ◯ Company
- ◯ Individual

Is this your personal acccount?
- ◯ Yes
- ◯ No

Who do you want to send money to?
- If you are sending money to a Person, select '**Individual**'
- If you are sending money to a Company, select '**Company**'

Is this your personal account?
- If the bank account you're sending money belongs to Yourself, or Your Own Company, select '**Yes**'
- If the bank account you're sending money belongs to a 3rd party (ie, not yourself or your company), select '**No**'

3 Select beneficiary's country

Please provide the following information about your beneficiary. All fields are mandatory.

Beneficiary's bank country
Select...

Beneficiary's account currency
Select...

- **Beneficiary's bank country:** The country where the bank account that you're sending money to is located in
- **Beneficiary account currency:** The currency of the account that you are sending money to

Please note: The screen will load more details to be keyed in.

4 Key in your beneficiary details

1. Friendly name

2. Company name *

3. Address Line 1 *

Address Line 2

Town / City *

County/State/Region

Postal code

Country *
Select...

4. Send a confirmation email to this beneficiary when a payment is made?
- ◉ Yes
- ◯ No

Email address

[Next]

1. **Friendly name:**
Name for your own reference (e.g. My DBS Account)

2. **Account name of beneficiary OR Company name of beneficiary:**
Name that follows the bank records exactly (If the name exceeds the number of characters allowed, please continue in Address Line 1)

3. **Address of beneficiary:**
Address of the company/person you're sending funds to (If you don't know the address, please input 'X' for all address fields)

4. **Confirmation email:**
If you would like to notify your beneficiary when payment is made to them, please select 'Yes' and input beneficiary's email address

Create beneficiary   ① ❷ ③

❷ Beneficiary's bank details

● Account number/Bank code   ○ Account number/SWIFT/BIC

Account number

[   ]

Bank code

[   ]

[Back]   [Next]

Click on

Account number/Bank code:

Input the beneficiary's bank Account Number and Bank Code.

Our system will auto-fill the SWIFT code based on the information you have keyed in.

Please check if you can see it in the next tab: '**Account number/SWIFT/BIC**'

**If you do not know your bank code OR
the SWIFT code isn't auto-filled in for you, kindly refer to below.**

Create beneficiary   ① ❷ ③

❷ Beneficiary's bank details

○ Account number/Bank code   ● Account number/SWIFT/BIC

Account number

[   ]

SWIFT/BIC

[   ]

[Back]   [Next]

Click on

Account number/SWIFT/BIC:

Input the beneficiary's bank account number **and** SWIFT/BIC code.

Create beneficiary   ① ② ❸

❸ Payment details

1. Payment reason *

[Select...   ⌄]

2. Payment notes/For further credit

[   ]

[Back]   [Submit]

1. **Payment reason:**
   Select '**Transfer to Own Account'** if you're sending funds back to your own account OR
   Select '**Paying Overseas Suppliers**' for supplier payment

2. **Payment notes/For further credit:**
   - Input notes that you would like your beneficiary to see for every payment (eg. From Company XXX)
   - Avoid placing specific invoice number in payment notes, there is a separate field under 'Payments' for this purpose

   For further credit - example: A specific instruction for the transfer to be made to another bank or a particular account, please key in your instructions here.

⊘ Confirm

Review the details you have supplied before you confirm this is where you would like your money sent.

And that's it, you've added a new beneficiary - Click Submit!

[Submit]