

Why Should I Trust?

Metis Global (Singapore) Pte. Limited





<https://www.metisgl.com.sg/home>

About Metis Global (Singapore)

In 2019, Metis Global Group Limited ("the Group") arrived in Singapore with the announcement of its new subsidiary, Metis Global (Singapore) Pte. Limited. In addition to Singapore, the Group has already established offices in Hong Kong and the Cook Islands.

Our operations in Singapore began in 2021, when Metis Global (Singapore) Pte. Limited was incorporated. We are regulated by the Monetary Authority of Singapore (MAS) and has been issued a Trust Business Licence.

Metis Global (Singapore) is a member of:

- Financial Industry Disputes Resolution Centre Ltd
- Institute of Banking and Finance Singapore
- Singapore Business Federation
- Singapore Trustees Association

[Learn More](#)

Licensed & Regulated by MAS

You can find us in the
Financial Institution
Directory [here](#).

The screenshot shows the MAS Financial Institution Directory page for METIS GLOBAL (SINGAPORE) PTE. LIMITED. The page is titled "METIS GLOBAL (SINGAPORE) PTE. LIMITED" and is noted as "Incorporated in Singapore". It features three main sections: "Licence Type/Status", "Key Personnel", and "Contact".

Licence Type/Status

- Licensed Trust Company

Key Personnel

- Resident Manager
 - CHEUNG MAN FAI
 - LAU KAH YEEN

Contact

- http://www.metisgl.com
- +65 62041313
- 3 CHURCH STREET #22-03 SAMSUNG HUB 049483

A map of Singapore is shown, with a red pin indicating the location of the institution. The map is labeled "View on OneMap".

www.eservices.mas.gov.sg/fid/institution/detail/239271-METIS-GLOBAL-SINGAPORE-PTE-LIMITED

Subsidiaries of Metis Global Group



Media Coverage

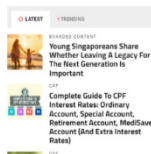
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What Is A Trust, And Should You Build Your Wealth Through A Trust In Singapore

Protecting your wealth for yourself and your beneficiaries.

by [Dinesh Dayani](#) September 19, 2023

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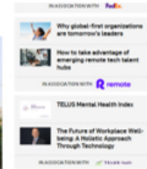
Securing wealth for generations through trust planning

Trusts offer a powerful tool to manage and protect your assets, ensuring they are distributed efficiently and privately to your loved ones for generations to come.

Estate planning is a crucial part of ensuring the well-being of one's self and their loved ones. A well-crafted estate plan ensures wishes are carried out, minimizes confusion and potential conflict amongst inheritors, and safeguards legacy for future generations.

Whilst traditional methods like wills have been a cornerstone of estate planning, they can be limited in their ability to provide control and privacy. This is where trusts come in, offering a powerful and flexible tool to protect wealth.

Explore further how individuals can safeguard their legacy and ensure their wishes are met with trust solutions from Metis SG, a subsidiary of the Metis Global Group.



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5. Shareholder earnings CDOs in Singapore climb 30% in 2023, report



WORK IT
10am - 2pm
With Cheryl Goh & Stanley Leong



On Air Dates	Discussion Topics
27 September	General knowledge about Trust
4 October	Will vs Trust
11 October	Trust for Vulnerable Beneficiaries
18 October	Asset Distribution and Maintaining Family Harmony



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METIS SINGAPORE
信托不再是高净值人士的专属财产和遗产规划工具
发布:10/09/2024 09:00 更新:10/09/2024 09:00 点赞



(图: iStock)

在财产规划领域，遗嘱是一项常见的工具，用于分配个人遗留的财产。根据新加坡法律，如果某人在去世时未立下遗嘱，其财产将依据《继承法令》进行分配。

若逝者仅有配偶而无父母、子女或后代，一般上所有财产将归配偶所有。若逝者有配偶和子女，一般情况下，配偶将获得一半的财产，剩余部分则分给子女。

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METIS MAKING TRUST AFFORDABLE

Metis Global Singapore: Democratising the power of trusts

Trusts are now more accessible than ever, enabling individuals from varying financial backgrounds to leverage their benefits.



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What is a Trust?



A Trust is a legal arrangement whereby:

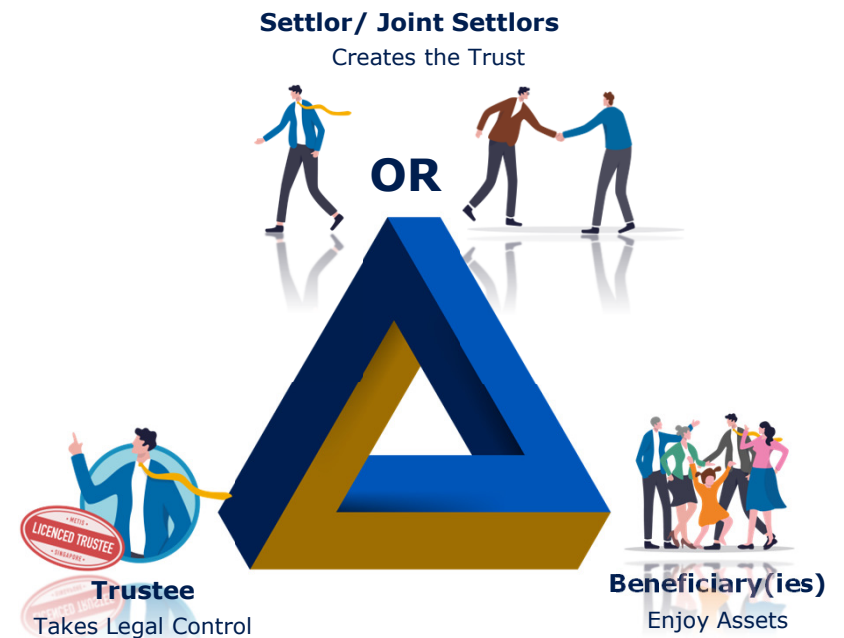
- a person **(Settlor)** transfers his assets
- to another **(Trustee)**
- to manage and administer for the benefit of others **(Beneficiaries)**
- in accordance with the terms of the Trust and the governing law.

How Does A Trust Work?

Includes **3 parties...**

- 1. Settlor;** the person who sets up and puts assets into the Trust
- 2. Trustee;** the person appointed by the Settlor to oversee the Trust
- 3. Beneficiary(ies);** the person who benefits from the Trust

The Key Component of a Trust



Important Documents

Letter of Wishes

- **Letter of Wishes** ("LOW") is a **separate non-legally binding document** where the settlor expresses his/her wishes as to how the Trust should be administered by the trustee.
- LOW serves as a guidance to the trustee as to how to distribute the Trust assets to the beneficiaries.

Trust Deed

- **Trust Deed** is a legal document which spells out the terms and conditions as to how the Trust should be administered.

Documents that make up the Trust Deed for Metis SG's Trust Plans:

- **Terms and Conditions** (together with the additional terms and conditions made available on Metis SG's website (if any))
- **Application Form** (excluding the section titled "Letter of Wishes")
- **Trust Plan Schedule and any future amendments**



TRUST BENEFITS



**Probate
Avoidance**



**Distribution
Privacy**



**Creditor
Protection**



**Gain Taxation
Savings**

Distribution Options



Lump Sum



Regular



**Deferred
Lump Sum**



**Deferred
Regular**



**Deferred Lump
Sum & Regular**

Comparison between a **Will** and a **Trust**

Will



Takes effect upon your death

A Will passes through probate, which can be a lengthy process

The contents of a Will may not remain private after your death

Creditors can claim from your estate

Lump sum distribution

Aspects



Effect



Probate Process



Public Access to Content



Creditor Access to Assets



Distribution

Trust



Takes effect as soon as you create it or as specified

A Trust does not pass through probate

Trust can remain private even after your death

Protection from creditors' claims

Different distribution options available

Metis SG Trust Solutions

Metis SG developed its trust solutions with 3 basic principles in mind – Simple, Accessible and Affordable.

The trust solutions are packaged into 2 plans where individuals are able to build his/her wealth under the protection of a simple trust structure through regular contributions or lump sum contribution into the trust.

All contributions into the trust will be fully invested into mutual funds selected by the individual who set up the trust (the Settlor). For now, there are 90 SGD denominated funds and 160 USD denominated funds available for the settlor to select.

Assets from the following sources can also be held in the trust



Regular Savings Trust Plan

Single **OR** Joint Settlor

Ages of 21-75 Years Old
(non-US persons only)

≥\$500 monthly
(5-30 years term plan)



Single Contribution Trust Plan

Single **OR** Joint Settlor

Ages of 21-80 Years Old
(non-US persons only)

≥\$30,000

Metis SG Trust Solutions

Both SapphirePRO and CitrinePRO are inter-vivos (living) trusts that are irrevocable and discretionary.

Settlor's Reserved Powers



Investment
Decision



Add/ Remove
Beneficiaries

- ☒ BENEFICIARY 1
- ☒ BENEFICIARY 2
- ☒ BENEFICIARY 3
- ☒ BENEFICIARY 4
- ☒ BENEFICIARY 5

Choice of Second Tier Beneficiary(ies)



Up to 5
Natural Persons

OR



1 Trust
Company

OR



1 Charity
Organization

Choice of Distributions



Lump
Sum



Regular



Deferred
Lump Sum



Deferred
Regular



Deferred
Lump Sum & Regular



Lump Sum

Metis SG Trust Solutions

Affordable Fees

Services included

Regular Contribution

Starting from SGD500/month



SGD10/mth

Refundable Trust Plan Fee
For CPT 10 years and above



0.5%/mth

Trust Settlement Charge
For as short as 5 years



0.15%/mth

Admin Charge

↓ **0.1%/mth** (after CPT)

Single Contribution

Starting from SGD30,000



0.63%/qtr

Trust Establishment Charge
For 36 months only



0.15%/mth

Admin Charge

↓ **0.1375%/mth** (≥ SGD50,000)

↓ **0.125%/mth** (≥ SGD 150,000)

**24/7 Online
Portal Access**

**Change of
Beneficiary**

**Change of
Letter of Wishes**

**Unlimited Fund
Switching**

**Assignment of
First Three
Insurance Policies**

**Provident Fund/
Insurance
Nomination**

Will Nomination

**Distribution of
Trust Assets**

Other Incidental Fees

**Insurance Policy
Assignment In/Out**

\$500

Per Policy, from the
Fourth Policy Onwards

**Receiving
Nomination/Processing
Death Claims**

1% of Relevant Amount

Min \$300,
(Cap at \$5,000)

**Deferred Distribution
Activation Fees**

One Time fee of
\$300 for each actual
activation

SapphirePRO (5 Years Plan)

Plan Illustration

Customer Monthly Regular SGD 500
 Estimated return: Illustrated at rate of 4.0%, 8.0% and customized 2.0% per annum

End of Year	Age	Total Contribution Paid	* Projected Plan Value assuming net rate of growth return per annum		
			4.0%	8.0%	2.0%
1	41	6,000	5,816	5,943	5,754
2	42	12,000	11,552	12,040	11,317
3	43	18,000	17,396	18,490	16,879
4	44	24,000	23,377	25,343	22,466
5	45	30,000	29,497	32,625	28,077
6	46	30,000	30,949	35,553	28,907
7	47	30,000	31,826	38,044	29,139
8	48	30,000	32,727	40,710	29,372
9	49	30,000	33,654	43,563	29,607
10	50	30,000	34,607	46,616	29,844
11	51	30,000	35,587	49,882	30,083
12	52	30,000	36,595	53,378	30,324
13	53	30,000	37,631	57,118	30,567
14	54	30,000	38,697	61,121	30,812
15	55	30,000	39,793	65,404	31,059
16	56	30,000	40,920	69,987	31,308
17	57	30,000	42,079	74,891	31,558
18	58	30,000	43,271	80,139	31,811
19	59	30,000	44,496	85,755	32,066
20	60	30,000	45,756	91,764	32,323

CitrinePRO (Single Contribution)

Plan Illustration

Customer Single Contribution SGD 30,000

Estimated return: Illustrated at rate of 4.0%, 8.0% and customized 2.0% per annum

End of Year	Age	Total Contribution Paid	* Projected Plan Value assuming net rate of growth return per annum		
			4.0%	8.0%	2.0%
1	41	30,000	29,898	31,112	29,308
2	42	30,000	29,797	32,266	28,631
3	43	30,000	29,696	33,462	27,971
4	44	30,000	30,354	35,592	28,026
5	45	30,000	31,027	37,858	28,081
6	46	30,000	31,714	40,269	28,136
7	47	30,000	32,417	42,832	28,192
8	48	30,000	33,135	45,559	28,247
9	49	30,000	33,870	48,460	28,303
10	50	30,000	34,620	51,545	28,359
11	51	30,000	35,388	54,909	28,415
12	52	30,000	36,172	58,493	28,471
13	53	30,000	36,974	62,310	28,527
14	54	30,000	37,793	66,376	28,583
15	55	30,000	38,631	70,708	28,640
16	56	30,000	39,487	75,323	28,696
17	57	30,000	40,362	80,239	28,753
18	58	30,000	41,256	85,476	28,809
19	59	30,000	42,171	91,054	28,866
20	60	30,000	43,105	96,997	28,923