

Insurance Policy Application Request Form 保险单申请表格

Plan Number 计划号码

I/We hereby request that Metis Global (Singapore) Pte. Limited ("Metis SG"), as the trustee to my/our Trust Plan, to apply for an Insurance Policy in accordance with the details as set out below.
我 / 我们希望向安智环球服务 (新加坡) ("Metis SG") 提交以下表格, 请求 Metis SG 作为以下保险单转让的受让人, 并根据以下所列详情将该保险单纳入信托计划。

Note 注意

Please complete this form and send it to service.metissg@metisgl.com using your registered email with Metis SG.
请填写此表格, 并使用您在 Metis SG 注册的电子邮件发送至 service.metissg@metisgl.com。

Please tick the required boxes, fill in the details and sign next to any amendments.
请勾选所需的选项, 填写详细信息, 并在任何修改旁边签名。

The Chinese translation of this form is for reference only. In case of any discrepancies between the Chinese and English versions, the English version shall prevail.
本表格中文翻译谨供参考。若中文版与英文版间有任何歧异, 则以英文版为准。

Part 1. Important Notes 第一部份 重要事项

1. Please read through the following terms and conditions pertaining to your Request prior to proceeding.
2. Metis SG does not offer any financial advisory services. You are encouraged to seek advice from your Financial Adviser (if any) before submitting the following request to Metis SG. Your Financial Adviser should be able to explain the implications of your decision and provide appropriate recommendations to you, taking into account your investment objectives, financial situation, needs and any applicable fees and charges
3. Metis SG may accept your request if the following conditions are met:
 - a. The Trust Plan has not been terminated;
 - b. The life assured is either the Settlor or the Beneficiary; and
 - c. The Insurance Policy is issued by a Singapore insurer that is licensed by the Monetary Authority of Singapore. Notwithstanding the satisfaction of the conditions set out above, Metis SG reserves the right to reject this Request at its sole and absolute discretion and will not be required to disclose the reason(s) for its decision.

1. 请在继续操作之前阅读以下与您的请求相关的条款及细则。
2. Metis SG 不提供任何财务顾问服务。在提交保险单申请表格之前, 建议您寻求您的财务顾问 (如有) 的建议。您的财务顾问将能够解释您决定的影响, 并根据您的投资目标、财务状况、需求以及任何适用的费用和收费向您提供适当的建议。
3. 如果满足以下条件, Metis SG 可根据其自行决定, 接受成为保险单转让的申请人:
a. 信托计划尚未终止;
b. 被保险人可以是设立人或受益人; 并且
c. 保险单由新加坡金融管理局许可的保险公司发行。

Part 2. Insurance Policy Details 第二部份 保险单详情

2.1 Insurance Policy Details 保险单详情

Name of Insurer 保险公司名称	<input style="width: 95%;" type="text"/>	Policy Type 保险单类型	<input style="width: 95%;" type="text"/>
Policy Name 保险单名称	<input style="width: 98%;" type="text"/>		
Policy Number 保单编号	Sum Assured (in the event of death of the life insured) 保险金额 (在保户死亡的情况下)	Currency 币种	<input style="width: 95%;" type="text"/>
Premium Frequency 保费支付周期	Premium Amount 保费金额	<input style="width: 95%;" type="text"/>	
Next Premium Due Date 下一保费应缴日期	Policy Cessation/ Maturity Date 保单终止/到期日期	<input style="width: 95%;" type="text"/>	
Remarks 说明	<input style="width: 98%;" type="text"/>		

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Part 3. Financial Advisor Contact Details

第三部份 财务顾问联系详情

I/We authorised Metis SG to contact the Financial Adviser below to facilitate the Insurance Policy application.
我/我们授权 Metis SG 联系以下财务顾问，以协助保险政策的申请。

Company 公司名称	<input type="text"/>		
Name 名字	<input type="text"/>	RNF Number RNF 号码	<input type="text"/>
Contact Number 联系号码	<input type="text"/>	Email address 电子邮件	<input type="text"/>

Part 4. Fees and Charges

第四部份 费用和收费

1. A servicing fee of SGD2,000 (exclusive of any goods and services tax) will be charged for each insurance policy application request that is accepted by Metis SG. Metis SG will not submit any application to the insurer unless and until payment of this servicing fee has been made.
 2. An administration charge will be imposed each time Metis SG is required to submit a claim under the Insurance Policy. The current administration charge is 1 percent of the claim amount, subject to a minimum of SGD300 and up to a maximum of SGD5,000.
 3. A servicing fee of SGD100 (exclusive of any goods and services tax) will be charged for each policy servicing request performed by Metis SG. Such policy servicing requests include, without limitation, any request to reinstate the Insurance Policy and make payment of any loan with respect to the Insurance Policy.
 4. Any fees or charges imposed by the insurer in relation to Metis SG's application for the Insurance Policy will be borne in its entirety by the Settlor.
 5. You may request Metis SG to subsequently assign the Insurance Policy to a Beneficiary under the Trust Plan. Such assignment will be regarded as a distribution of trust assets and will be subject to the terms and conditions of the Trust Plan and Metis SG's internal policies and procedures with respect to distributions of trust assets. In the case of a successful assignment, an assignment fee of SGD500 (exclusive of any goods and services tax) will be separately charged and any fees and charges imposed by the insurer will also be borne in its entirety by the Settlor.
 6. Metis SG reserves the right to vary the charges contemplated under this Part 4 by giving you not less than three months' prior notice in writing, or such other period of notice in compliance with the relevant regulatory requirements.
 7. For the avoidance of doubt, any fees and charges referred to in this Part 4 is in respect of each Insurance Policy and each claim made thereunder.
1. 每份由 Metis SG 接受的保险政策申请请求将收取 2,000 新元的服务费（不含任何商品及服务税）。在支付此服务费之前，Metis SG 不会向保险公司提交任何申请。
 2. 每次 Metis SG 需根据保险政策提交理赔时，将收取行政费用。当前行政费用为理赔金额的 1%，最低为 300 新元，最高为 5,000。
 3. Metis SG 每处理一项保单服务请求，将收取 100 新元的服务费（不含任何商品及服务税）。保单服务请求包括但不限于申请恢复保险政策及支付与保险政策相关的贷款。
 4. 因 Metis SG 申请保险政策而产生的任何由保险公司收取的费用或费用，将由委托人全额承担。
 5. 您可以请求 Metis SG 将保险单随后转让给信托计划下的受益人。此类转让将被视为信托资产的分配，并将受信托计划的条款及细则以及 Metis SG 关于信托资产分配的内部政策和程序的约束。若转让成功，将另行收取 500 新元的转让费用（不含任何商品与服务税），且保险公司所收取的任何费用及收费将由您全额承担。
 6. Metis SG 保留在书面通知您不少于三个月的时间或根据相关监管要求规定的其他通知期限后，变更第四部份所述费用的权利。
 7. 为避免疑义，第三部份所述的任何费用和收费均针对每份保险单及其下的每一项理赔。

Part 5. Purpose of Application

第五部份 申请目的

Please confirm that the purpose of the application is to provide a source of financial security for the beneficiaries under this Trust.

请确认转让的目的是为本信托项下的受益人提供财务保障来源。

Yes 是

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Part 6. Premium Payments on the Insurance Policy in the event of a Successful Application by Metis SG
第五六部份 Metis SG 申请成功后保险政策的保费支付

1. Notwithstanding that Metis SG is the legal owner of the Insurance Policy, it shall remain your sole responsibility to ensure that any premiums, or any charges, on the Insurance Policy is paid in a timely manner.
 2. Within [30 days] after the inception date of the Insurance Policy, the Settlor shall set up a banking arrangement to pay for all regular premiums of the Insurance Policy that are payable in future.
 3. Under no circumstances will Metis SG be under any obligation to pay any premium, or any charges, on the Insurance Policy.
 4. Metis SG will notify you, as soon as possible and in any event no later than 5 business days, after receiving any premium payment notice from the insurer of the Insurance Policy regarding Metis SG's receipt of such notice. A copy of the premium payment notice will be forwarded to you via email.
 5. Upon being notified of the premium payment notice, you shall arrange for the premium to be paid in accordance with the instructions specified in the premium payment notice.
 6. In the event that the premiums of the Insurance Policy are not paid by you in a timely manner, the Insurance Policy may lapse or be terminated. Metis SG shall not be liable for losses, costs and expenses of any kind which may be incurred as a result of the lapsing and/or termination of the Insurance Policy unless due to the fraud, gross negligence or wilful misconduct of Metis SG or any other person appointed or employed by it.
1. 尽管 Metis SG 是保险政策的法律所有人，但您仍需全权负责确保保险政策的所有保费或费用按时支付。
 2. 在保险政策生效之日起 [30 天] 内，委托人应设立银行付款安排，以支付未来应缴的所有定期保费。
 3. 在任何情况下，Metis SG 均无义务支付保险政策的任何保费或费用。
 4. Metis SG 在收到保险公司发出的保险政策保费支付通知后，将尽快通知您，且不会晚于 5 个工作日内通知您，并通过电子邮件向您转发该保费支付通知的副本。
 5. 在收到保费支付通知后，您应按照通知中规定的指示安排支付保费。
 6. 如果您未能及时支付保险政策的保费，则保险政策可能会失效或被终止。除非因 Metis SG 或其指定或雇佣的其他人员的欺诈、重大过失或故意不当行为所致，否则 Metis SG 不对因保险政策失效和/或终止而产生的任何损失、成本及费用承担责任。

Part 7. Payouts on the Insurance Policy in the event of a Successful Application by Metis SG
第七部份 Metis SG 申请成功后保险政策的赔付

1. All monies, including but not limited to the cash proceeds on surrender of the Insurance Policy, maturity or death benefits, interests, dividends, loans, bonuses, profits and other benefits already accrued, or which may accrue in the future, and which may become payable under the Insurance Policy will be paid directly to Metis SG for the designated Trust Plan as and when they become payable under the Insurance Policy.
 2. Any death benefits received by Metis SG for your Trust Plan will either be allocated to purchase Units in accordance with our latest record of your Asset Choice selection or be distributed to your beneficiaries in accordance with the Terms and Conditions of the Trust Plan. (only applicable to regular contribution trust plans) In the event that death benefits are received while the Trust Plan is within ICP, Metis SG reserves the right to apply the whole or any part of the death benefits towards satisfying any regular contributions and/or additional regular contributions for the remaining ICP before purchasing any Units or making any distribution as aforementioned.
 3. Metis SG reserves the right to convert the payout into any foreign currency for investments and any fees or charges imposed for the conversion will be deducted from the payout.
 4. Any fees or charges imposed by the insurer in relation to the payout of the Insurance Policy to Metis SG will be borne in its entirety by you.
1. 所有款项（包括但不限于因退保、保单到期或身故理赔所产生的现金收益、利息、股息、贷款、红利、利润及其他已产生或未来可能产生的权益），在保险政策项下可支付时，将直接支付给 Metis SG 以用于指定的信托计划。
 2. Metis SG 收到的任何死亡赔偿金，将根据我们最新的资产选择记录，用于购买基金单位，或根据信托计划的条款及细则分配给您的受益人（仅适用于定期缴费的信托计划）。若在信托计划处于首初供款期间收到死亡赔偿金，Metis SG 保留在购买任何基金单位或进行上述分配之前，优先将全部或部分死亡赔偿金用于支付剩余首初供款期间的定期定额供款/或增加定期定额供款的权利。
 3. Metis SG 保留将赔付款项兑换为任何外币用于投资的权利，任何因货币兑换产生的费用或收费将从赔付款项中扣除。
 4. 因保险公司向 Metis SG 支付保险政策赔付款项而产生的任何费用或收费，均由您全额承担。

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Part 8. Declaration and Signature

第八部份 申请人声明及签署

1. I/We confirm that I/we have read, understood and accepted the terms and conditions in this document (including the Important Notes section). I/We confirm that the information provided by me/us is true, correct, complete and not misleading in any way. I/We accept full responsibility for them. I/We have not withheld any information. I/We undertake to provide any further information and documentation reasonably required from time to time.
2. I / We agree on my/our behalf and on behalf of every insured person that Metis SG is authorised to collect, retain, use and/or disclose as it reasonably deems fit, any information in respect of me/us/any insured person, that is received by Metis SG to the insurer, reinsurers, medical organisations, my/our financial advisers, service providers, and any other relevant third parties (who may have to disclose my/our data to their service providers such as medical providers, reinsurers, medical evacuation agencies, judicial, regulatory, government, statutory authorities and dispute resolution parties) whether within or outside Singapore. As far as reasonably possible, Metis SG will release such information to such parties on the understanding that the information will be kept strictly confidential and be used, disclosed and retained in accordance with the relevant law.
3. I/We understand that Metis SG will notify me/us once my/our Request has been reviewed and a decision has been made.
4. I/We understand that Metis SG reserves the right to reject this Request at its sole and absolute discretion and will not be required to disclose the reason(s) for its decision.
5. I/We confirm that I/we am/are solely responsible for ensuring that any premiums, or any charges, on the Insurance Policy is paid in a timely manner. (Where relevant) I/We further undertake to set up a banking arrangement to pay for all regular premiums of the Insurance Policy that are payable in future within [30 days] after the inception of the Insurance Policy. I/We understand that under no circumstances will Metis SG be under any obligation to pay any premium, or any charges, on the Insurance Policy.
6. I/We understand that if Metis SG successfully applies for an Insurance Policy pursuant to this Request, Metis SG will be the legal owner of the Insurance Policy and will be responsible for submitting any relevant claims under the Insurance Policy. I/We understand that Metis SG's obligation to submit any relevant claim under the Insurance Policy shall at all times be conditional upon Metis SG receiving all the necessary information and/or supporting documents as required by the insurer in respect of the claim. I/We undertake that any information and/or documentation provided to Metis SG for the purposes of making a claim under the Insurance Policy shall be true and correct in every detail and must not contain any false or fraudulent statements or suppress, conceal or falsely state any material fact whatsoever. I/We acknowledge that Metis SG will not be liable to me/us whatsoever in the event that the claim has been rejected by the insurer.
7. I/We shall jointly and severally indemnify Metis SG and any person appointed or employed by it against all claims, liabilities, damages, losses, costs and expenses of any kind which may be incurred by any of them and all actions or proceedings which may be brought by or against any of them in connection with this Request and the administration and management of the Insurance Policy thereafter, unless due to the fraud, gross negligence or wilful default of Metis SG or any other person appointed or employed by it, and this indemnity shall continue notwithstanding the termination of my/our Trust Plan.
8. Metis SG may rely conclusively upon and accept any communications received via email or Metis SG's online portal (collectively "electronic communications") which is in good faith believed to be genuinely endorsed/signed by me/us. Any transactions made according to electronic communications shall be irrevocable and binding upon me/us, whether such electronic communications have in fact been given with or without my/our authority, knowledge, or consent. Under no circumstances shall Metis SG have any duty or any obligation to enquire or verify the identity of the person(s) initiating the electronic communications in my/our name or the authenticity of the signature appearing thereon or the validity of the electronic communications.
9. I/We understand that sending electronic communications is not a safe and reliable transmission method. Metis SG shall not, in any event, be liable to me/us for any liabilities, losses, damages, or expenses whatsoever arising out of or in connection with any network or telephone line failure, any uncontrollable events or any other circumstances beyond Metis SG's control.
10. By submitting this form, I/We agree and consent to Metis SG, and/or its appointed representatives and/or agents (and such other third-party service providers as it may engage (such representatives, agents, and/or authorised service providers each a "Representative"), and who may be located outside Singapore) collecting, receiving, using, storing, disclosing and processing my/our Personal Data (as defined in, and) in accordance with the terms of the Terms and Conditions and Metis SG's privacy policy as amended from time to time, available at https://metisgl.com.sg/media/1/docs/privacy_policy.pdf ("Privacy Policy"), and the terms of Privacy Policy are incorporated into the Terms and Conditions by reference, and are also available to me/us upon request), for one or more of the following purposes:

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Part 8. Declaration and Signature (continued)

第八部份 申请人声明及签署 (继续)

- a. processing this form and providing me/us with your products and services as well as the services of third-party service providers;
- b. administering and/or managing our relationship and/or our account(s) with you; and/or
- c. any of the purposes set out in the Privacy Policy.

I/We further represent and warrant that:

- a. all of the information provided by me/us to you (including without limitation personal particulars and contact information) is accurate and complete; and
- b. if in connection with this form, I/we provide the personal data of any third parties, I/we further warrant and represent that these third parties have also consented to the terms of the Privacy Policy, and to the collection, receipt, use, storage, disclosure and processing of their personal data in accordance with the aforesaid and for all the purposes contemplated herein; and
- c. I /We are the user(s) and/or subscriber(s) of the telephone number and other contact details provided by me/us in this application or other documents furnished by/to Metis SG and agree that I/we have read and understood the above provisions.

I/We confirm that my/our signature in this Request is/are to confirm all declarations and confirmations in this Request and my/our acceptance of all the terms and conditions in the Deed which shall be binding on me/us.

1. 我/我们确认已阅读并核实本文件中的信息（包括《重要事项》部分）。我/我们确认所提供的信息是真实、准确、完整的，并且没有任何误导性。我/我们对此信息承担全部责任。我/我们没有隐瞒任何信息。我/我们承诺根据需要及时提供任何进一步的信息和文件。
2. 我/我们同意，代表我/我们以及所有被保险人授权 Metis SG 根据其合理判断收集、保留、使用和/或披露与我/我们/任何被保险人相关的任何信息，这些信息由 Metis SG 接收，并可提供给保险公司、再保险公司、医疗机构、我/我们的财务顾问、服务提供商及其他相关第三方（这些第三方可能需要将我/我们的数据披露给其服务提供商，如医疗提供者、再保险公司、医疗撤离机构、司法、监管、政府、法定机构及争议解决方），无论这些第三方位于新加坡境内或境外。在合理的情况下，Metis SG 将向这些方披露此类信息，前提是这些方理解该信息将严格保密，并且会根据相关法律使用、披露和保留该信息。
3. 我/我们理解，Metis SG 将在审查我的/我们的请求并作出决定后通知我/我们。
4. 我/我们理解，Metis SG 保留全权决定是否拒绝此请求的权利，并且无须披露拒绝决定的理由。
5. 我/我们确认，我/我们有责任确保保险政策的任何保费或费用按时支付我/我们进一步承诺，在保险政策生效后 [30 天] 内设立银行安排，以支付未来所有应缴的定期保费（如适用）。我/我们理解，在任何情况下，Metis SG 均无义务支付保险政策的任何保费或费用。
6. 我/我们理解，如果 Metis SG 根据此申请成功申请了保险政策，Metis SG 将成为保险政策的法律所有人，并负责根据保险政策提交任何相关的索赔。我/我们理解，Metis SG 提交保险政策相关索赔的义务始终以 Metis SG 收到保险公司要求的所有必要信息和/或支持文件为条件。我/我们承诺，任何提供给 Metis SG 用于提交保险政策索赔的信息和/或文件均应真实、准确，且不得包含任何虚假或欺诈性陈述，或隐瞒、隐匿或虚假陈述任何重要事实。我/我们承认，若索赔被保险公司拒绝，Metis SG 对我/我们不不承担任何责任。
7. 我们同意赔偿 Metis SG 及其任命或雇用的任何人员因本表格中指定的请求而可能产生的所有索赔、责任、损害、损失、成本和任何类型的费用，以及与之相关的所有诉讼或法律程序，除非是由于 Metis SG 或其任命或雇用的其他人员的过失或故意违约所导致的。
8. Metis SG 可以完全依赖并接受通过电子邮件或 Metis SG 在线门户收到的任何指示（统称为“电子指示”），这些指示被善意地认为是我 / 我们签署的真实指示。根据电子指示进行的任何交易对我 / 我们均为不可撤销和具有约束力的，无论这些电子指示实际上是否是在我 / 我们的授权、知情或同意下给予的。在任何情况下，Metis SG 均不承担任何询问或验证以我 / 我们名义发出电子指示的人员身份、所示签名的真实性或电子指示有效性的义务。
9. 我 / 我们理解，发送电子指示并不是一种安全可靠的传输方式。在任何情况下，Metis SG 对我 / 我们因任何网络或电话线路故障、任何不可控事件或其他超出 Metis SG 控制范围的情况而产生的任何责任、损失、损害或费用均不承担责任。
10. 通过提交此表格，我/我们同意并授权 Metis SG 及/或其指定的代表及/或代理（以及其可能聘请的其他第三方服务提供商（此类代表、代理及/或授权服务提供商均称为“代表”），并且这些代表可能位于新加坡境外）收集、接收、使用、存储、披露和处理我/我们的个人数据（定义见条款和条件），并依据不时修订的 Metis SG 隐私政策（可在 https://metisgl.com.sg/media/1/docs/privacy_policy.pdf 获取）（“隐私政策”）的条款进行操作，隐私政策的条款通过引用并入条款和条件，并可根据我/我们的要求提供），用于以下一项或多项目的：
 - a. 处理此表格，并向我/我们提供您的产品和服务以及第三方服务提供商的服务；
 - b. 管理和/或维护我们与您之间的关系和/或我们的账户；
 - c. 隐私政策中列明的任何目的。

我/我们进一步声明并保证：

- a. 我/我们向您提供的所有信息（包括但不限于个人资料和联系信息）均准确完整；
- b. 如果与此表格相关，我/我们提供了任何第三方的个人数据，我/我们进一步保证并声明，这些第三方也已同意隐私政策的条款，并同意根据上述条款及此处规定的所有目的，收集、接收、使用、存储、披露和处理其个人数据；
- c. 我/我们是此申请或其他提供给 Metis SG 的文件中提供的电话号码和其他联系信息的用户和/或订户，并同意我/我们已阅读并理解上述条款。

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Part 8. Declaration and Signature (continued)
第八部份 申请人声明及签署 (继续)

我/我们确认，本请求表中的签名旨在确认本请求表中的所有声明和确认，以及我/我们对契约中所有条款及细则的接受，这些条款及细则对我/我们具有约束力。

Signature 签名

Full Name of Settlor

(As in FIN/Passport including any alias and other names)

委托人全名

(与 FIN/护照上的姓名一致，包括任何别名和其他姓名)

Date Signed (DD/MM/YYYY) 签署日期 (日/月/年)

Signature 签名

Full Name of Joint Settlor (where applicable)

(As in FIN/Passport including any alias and other names)

联名委托人全名 (如适用)

(与 FIN/护照上的姓名一致，包括任何别名和其他姓名)

Date Signed (DD/MM/YYYY) 签署日期 (日/月/年)