

Insurance Policy Assignment Request Form 保险单转让表格

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 be named as the assignee to the assignment of the following Insurance Policy into my/our Trust Plan 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.metisgg@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.metisgg@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 the Additional Terms and Conditions made available on Metis SG's website (<https://metisgl.com.sg>) -> Plans -> JadePRO prior to proceeding with this Request.
 2. Metis SG does not offer any financial advisory services. You are encouraged to seek advice from your Financial Adviser (if any) before assigning any Insurance Policy into your Trust Plan. 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, at its sole and absolute discretion, accept to be the named assignee for the assignment of the Insurance Policy into the Trust Plan if the following conditions are met:
 - a. The Trust Plan has not been terminated;
 - b. The Insurance Policy is issued by a Singapore insurer that is licensed by the Monetary Authority of Singapore;
 - c. The policyowner has full rights, power and authority and the legal capacity to assign the Insurance Policy to Metis SG;
 - d. (where relevant) The policyowner has set up a Giro arrangement to pay for all regular premiums of the Insurance Policy that are payable in future; and
 - e. The Settlor or the youngest Settlor (in the case of a joint application) is below the age of 80 at the date of this Request.
 4. 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.
1. 在提交本请求之前, 请查阅 Metis SG 官网 (<https://metisgl.com.sg>) -> Plans -> JadePRO 页面所提供的附加条款及细则。
 2. Metis SG 不提供任何财务顾问服务。在提交保险单转让表格之前, 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受让人:
 - a. 信托计划尚未终止;
 - b. 保险单由新加坡金融管理局许可的保险公司发行;
 - c. 保险单持有人具有完全的权利、授权和法律能力, 将保险单转让给 Metis SG;
 - d. 保险单持有人已设立电子转账系统 (GIRO) 转账安排, 以支付未来所有应付的定期保险费 (如适用);
 - e. 委托人或最年轻的委托人 (如为联合申请) 在本请求日期时年龄未满 80 岁。
 4. 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。

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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 type="text"/>	Policy Type ¹ 保险单类型 ¹	<input type="text"/>
Policy Name 保险单名称	<input type="text"/>		
Policy Number 保单编号	<input type="text"/>	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
Premium fully paid? 保费是否全额缴清?	<input type="radio"/> Yes 是 <input type="radio"/> No 否		
Premium Frequency ² 保费支付周期	<input type="text"/>	Premium Amount ² 保费金额	<input type="text"/>
Next Premium Due Date ² 下一保费应缴日期 ²	<input type="text"/>	Policy Cessation/ Maturity Date ³ 保单终止/到期日期 ³	<input type="text"/>
Remarks 说明	<input type="text"/>		

1. Excluding any policy with recurring living benefits and/or investment-linked insurance policies.
 2. Details are not required for policy which are fully paid.
 3. Not Applicable for life insurance policy.
1. 不包括具有持续性生存利益和/或投资连结保险单的保险单。
2. 对于已全额缴纳保费的保险单，无需提供详细信息。
3. 不适用于人寿保险单

2.2 Insurance Policy Owner Details 保险单持有人详细信息

Is the Settlor the Policy Owner? Please skip to Section 2.3 if you have selected "Yes".

委托人是否为保险单持有人？如果选择“是”，请跳至 2.3 部分。

Yes 是 No, please disclose Policy Owner's details and complete the Third-Party Payor Form and submit it along with this application form for our review:
否，请提供保险单持有人的详细信息，并填写第三方付款人表格，并与本申请表一并提交以供我们审核：

Surname 姓氏 (As in IC/Passport) (与身份证/护照一致)	<input type="text"/>		
Given Name 名字 (As in IC/Passport including any alias and other names) (与身份证/护照一致，包括任何别名和其他名称)	<input type="text"/>		
Nationality 国籍	<input type="text"/>	Country of Birth 出生国家	<input type="text"/>
Nature of Industry 行业性质	<input type="text"/>	Business Type 业务类型	<input type="text"/>
Occupation 职业	<input type="text"/>		
Relationship to Settlor(s) 与委托人的关系	<input type="radio"/> Parent 父母 <input type="radio"/> Spouse 配偶 <input type="radio"/> Child 子女 <input type="radio"/> Others 其他		

Note: Documented proof of relationship will be required. 备注：需提供证明关系的文件。

2.3 Payor's Details 付款人资料

Is the Policy Owner the Payor? The Payor refers to the person making the premium payments. Please skip to Section 2.4 if you have selected "Yes".

保险单持有人是否为付款人？付款人指的是支付保费的人。如果选择“是”，请跳至第 3 部分。

Yes 是 No, please disclose Payor's details and complete the Third-Party Payor Form and submit it along with this application form for our review:
否，请提供付款人的详细信息，并填写第三方付款人表格，并与本申请表一并提交以供我们审核：

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Part 2. Insurance Policy Details (continued)
第二部份 保险单详情 (继续)

Surname 姓氏
(As in IC/Passport)
(与身份证/护照一致)

Given Name 名字
(As in IC/Passport including any alias and other names)
(与身份证/护照一致, 包括任何别名和其他名称)

Nationality 国籍 Country of Birth 出生国家 Passport No./ Identity Card No. 护照号码/身份证号码

Nature of Industry 行业性质 Business Type 业务类型

Occupation 职业

Relationship to Policy Owner 与保单持有人关系 Parent 父母 Spouse 配偶 Child 子女 Others 其他

Note: Documented proof of relationship will be required. 备注: 需提供证明关系的文件。

Please state reason for paying the premium on behalf of the Policy Owner:
请说明代替保单持有人支付保费的原因

- Family Financial Arrangement 商业或贸易收入
- Gift to Policy Owner 目前和/或过去的就业工作的薪资或佣金收入
- Private Financial agreement 遗产和赠与
- Employee - Employer benefits 投资 (股票、债券、单位信托等)
- Others. Please provide details below: 其他。请在下方提供详细信息:

2.4 Life Insured's Details 投保人资料

Is the Settlor the life insured?
委托人是否是保险的投保人?

Yes 是 No and in the event of the death of all the Settlers, it is the settlor(s) wish that the policy be surrendered.
否, 并且如果所有委托人均去世, 委托人希望该保单被退保。

Part 3. Purpose of assignment
第三部份 转让目的

Please confirm that the purpose of the assignment 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

Part 4. Fees and Charges
第四部份 费用和收费

- You may request for Metis SG to be named as the assignee for the assignment of the Insurance Policy into the Trust Plan. An assignment fee of SGD500 (exclusive of any goods and services tax) may be charged by Metis SG for each successful assignment of Insurance Policy.
- 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.
- 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.
- 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.
- Any fees or charges imposed by the insurer in relation to the assignment of the Insurance Policy to Metis SG will be borne in its entirety by the Settlor.

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Part 4. Fees and Charges (continued)

第四部份 费用和收费 (继续)

6. 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 you.
 7. 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.
 8. 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. 您可以申请将 Metis SG 指定为保险单转让至信托计划的受让人。Metis SG 可能会对每次成功转让保险单收取 500 新元的转让费用 (不包括任何商品与服务税)。
 2. Metis SG 需要根据保险单提交理赔时, 将收取管理费用。当前的管理费用为理赔金额的 1%, 最低为 300 新元, 最高为 5000 新元。
 3. 每次 Metis SG 执行保单服务请求时, 将收取 100 新元的服务费 (不包括任何商品与服务税)。此类保单服务请求包括但不限于任何要求恢复保险单或支付与保险单相关贷款的请求。
 4. Metis SG 保留将赔付金额转换为任何外币进行投资的权利, 且任何因转换而产生的费用或收费将从赔付金额中扣除。
 5. 与保险单转让给 Metis SG 相关的任何保险公司收取的费用或收费将由委托人全额承担。
 6. 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与条件以及 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。
 7. 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。
 8. 为避免疑义, 第四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. Declaration and Signature

第五部份 申请人声明及签署

1. I/We confirm that I/we have read and verified the information 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 understand that my/our Trust Plan is subject to the Additional Terms and Conditions – Assignment of Insurance Policy. I/We confirm that I/we have read, understood and accepted such Terms and Conditions which is available on Metis SG's website (<https://metisgl.com.sg>).
3. I/We confirm that I/we have read, understood and accepted Part 4 – Fees and Charges.
4. I/We understand that Metis SG will notify me/us once my/our Request has been reviewed and a decision has been made.
5. 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.
6. 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 unless due to the fraud, gross negligence or wilful default of Metis SG or any other person appointed or employed by it.
7. 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.
8. 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.

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Part 5. Declaration and Signature (continued)

第五部份 申请人声明及签署 (继续)

9. 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:
- processing this form and providing me/us with your products and services as well as the services of third-party service providers;
 - administering and/or managing our relationship and/or our account(s) with you; and/or
 - any of the purposes set out in the Privacy Policy.

I/We further represent and warrant that:

- all of the information provided by me/us to you (including without limitation personal particulars and contact information) is accurate and complete; and
- 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
- 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.

10. I/We have attached the following documents with this request:

- Insurance Policy Document(s) and/or latest Policy Statement(s) Yes No
- Third Party Payor Form where Settlor is NOT the Policy Owner Yes No
- Third Party Payor Form where the Payor of premium is NOT the Policy Owner Yes No

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.

- 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。
- 我/我们明白，我/我们的信托计划需遵守《保险单转让附加条款》。我/我们确认已阅读、理解并接受这些条款及细则，相关内容可在 Metis SG 官网 (<https://metisgl.com.sg>) 查阅。
- 我/我们确认已阅读、理解并接受《第四部份 费用和收费》。
- 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。
- 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。
- 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。
- 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。
- 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。

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Part 5. Declaration and Signature (continued)
第五部份 申请人声明及签署 (继续)

9. 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。

10. 我/我们已随此请求附上以下文件：

- 保险单文件和/或最新的保单声明 是 否
- 若委托人非保单持有人，提供第三方供款人表格 是 否
- 若保费付款人非保单持有人，提供第三方供款人表格 是 否

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 Main Applicant

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

主要申请人全名

(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 Applicant (where applicable)

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

联名申请人全名 (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)