

Insurance Policy Nomination Request Form 保险单提名请求表格

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, be named as the beneficiary of the death benefits (via a revocable nomination) under the following 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 作为我/我们信托计划的受托人, 指定为以下保险单的身故保险金受益人 (通过可撤销指定), 并按照以下所列的详细信息执行。

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. 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
 2. 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.
 3. Your Trust Plan has to be in force for the death benefit payout to be received into the Trust Plan.
 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. 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。
 2. Metis SG 保留全权自行决定拒绝此请求的权利, 且无需披露其决定的理由。
 3. 您的信托计划必须有效, 才能将死亡赔付款项支付到信托计划中。
 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。

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	Country of Insurer 保险公司所在国家	
Policy Name 保险单名称		
Policy Number 保单编号	Expected Payout 预期赔付	Currency 币种
Remarks 说明		

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, 并填写第三方支付人表格, 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 Settlor(s) 与委托人的关系 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。

2.3 Life Insured's Details 投保人资料

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

Yes, for Settlor 是, 对委托人 Yes, for Joint Settlor 是, 对联名委托人 No for both 两者都不是

Part 3. Fees and Charges
第三部份 费用和收费

- An administration charge will be imposed by Metis SG on the death benefit received under the Insurance Policy into your Trust Plan. The current administration charge is 1 percent of the death benefit received, subject to a minimum of SGD300 and up to a maximum of SGD5,000.
 - Any fees or charges imposed by the insurer in relation to the death benefit under the Insurance Policy to Metis SG will be borne in its entirety by the Settlor.
 - Metis SG reserves the right to convert the death benefit received into any foreign currency for investments and any fees or charges imposed for the conversion will be deducted from the death benefit received.
 - Metis SG reserves the right to vary the charges contemplated under this Part 3 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.
 - For the avoidance of doubt, any fees and charges referred to in this Part 3 is in respect of each Insurance Policy and each death benefit received made thereunder.
- Metis SG 将对通过保险单收到的身故保险金, 纳入您的信托计划时, 收取管理费用。当前的管理费用为收到的身故保险金的 1%, 最低收费为 SGD300, 最高收费为 SGD5,000。
 - 保险公司对与保险单下的身故保险金相关的任何费用或收费, 将由设立人全部承担。
 - Metis SG 保留将收到的身故保险金转换为任何外币进行投资的权利, 转换过程中产生的任何费用或收费将从收到的身故保险金中扣除。
 - 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, 变更第三部份所述费用的权利。
 - 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。

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Part 4. Declaration and Signature

第四部份 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 confirm that I/we have read, understood and accepted Part 3 – Fees and Charges.
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 understand that Metis SG only accept revocable nomination and accept no liabilities if the nomination was subsequently revoked.
6. I/We understand that I/we retain control over the Insurance Policy and its living benefits.
7. I/We understand that Metis SG does not, by virtue of this nomination, assume any responsibility for the processing of any claims under the Insurance Policy.
8. I/We understand that I/we will be responsible for ensuring the validity of the nomination with the insurer.
9. 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.
10. I/We agree that Metis SG will not be responsible to me (or any other person) if I/we fail to:
 - a. update the insurer of any change in Metis SG contact details; or
 - b. inform Metis SG of the change in nomination.
11. 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.
12. 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.
13. 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
14. 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:
 - 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.

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Part 4. Declaration and Signature (continued)

第四部份 申请人声明及签署 (继续)

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/我们确认已阅读、理解并接受《第三部份 费用和收费》。
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/我们理解，Metis SG 仅接受可撤销的指定，并且在指定随后被撤销的情况下，概不承担任何责任。
6. 我/我们理解，我/我们保留对保险单及其生存利益的控制权。
7. 我/我们理解，Metis SG 并不因本次指定而承担处理任何保险单下理赔的责任。
8. 我/我们理解，我/我们将负责确保指定在保险公司处的有效性。
9. 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。
10. 我/我们同意，如果我/我们未能：
 - a) 向保险公司更新 Metis SG 的联系方式；或
 - b) 通知 Metis SG 提名变更，
 Metis SG 将不对我/我们（或任何其他人员）负责。
11. 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。
12. 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。
13. 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
14. 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。

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。

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Part 4. Declaration and Signature (continued)
第四部份 申请人声明及签署 (继续)

<p>Signature 签名</p> <div style="background-color: #f0f0f0; height: 60px; margin-bottom: 10px;"></div> <p>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)</p> <div style="background-color: #f0f0f0; height: 20px; margin-bottom: 10px;"></div> <p>Date Signed (DD/MM/YYYY) 签署日期 (日/月/年)</p> <div style="background-color: #f0f0f0; height: 20px;"></div>	<p>Signature 签名</p> <div style="background-color: #f0f0f0; height: 60px; margin-bottom: 10px;"></div> <p>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)</p> <div style="background-color: #f0f0f0; height: 20px; margin-bottom: 10px;"></div> <p>Date Signed (DD/MM/YYYY) 签署日期 (日/月/年)</p> <div style="background-color: #f0f0f0; height: 20px;"></div>
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