

## Insurance Policy Nomination Request Form

**Plan Number**

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.

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
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**Note:**

Please complete this form and send it to [service.sg@metisgl.com](mailto:service.sg@metisgl.com) using your registered email with Metis SG. Please fill in the details and if you make any amendments, please sign next to them.

### Section A – Important Notes

- Metis SG does not offer any financial advisory services. You are encouraged to seek advice from your Financial Adviser (if any) before naming Metis SG as beneficiary to any Insurance Policy. 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.
- 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.
- Your Trust Plan has to be in force for the death benefit payout to be received into the Trust Plan.
- 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.

### Section B – Insurance Policy Details

#### 1. Insurance Policy Details

|                 |  |                    |  |
|-----------------|--|--------------------|--|
| Name of Insurer |  | Country of Insurer |  |
| Policy Name     |  |                    |  |
| Policy Number   |  | Expected Payout    |  |
|                 |  | Currency           |  |
| Remarks         |  |                    |  |

#### 2. Insurance Policy Owner Details

Is the Settlor the Policy Owner? Please skip to Section 3 if you have selected "Yes".

- Yes   
  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:

#### Section B-2A

|   |  |                  |  |
|---|--|------------------|--|
| Policy Owner's Name<br><small>(As in NRIC/FIN/Passport including any alias and other names)</small> |  |                  |  |
| NRIC/FIN/ Passport  |  | Nationality      |  |
|   |  | Country of Birth |  |
| Nature of Industry  |  | Business Type    |  |
| Occupation  |  |                  |  |
| Relationship to Settlor(s)  | <input type="radio"/> Parent <input type="radio"/> Spouse <input type="radio"/> Child <input type="radio"/> Others |                  |  |

**Note: Documented proof of relationship will be required**

#### 3. Insurance Policy Owner Details

Is the Settlor/Joint Settlor the life insured?

- Yes, for Settlor   
  Yes, for Joint Settlor   
  No for both

Plan Number

|  |  |  |  |  |  |  |  |  |  |
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**Section C – Fees and Charges**

1. 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.
2. 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.
3. 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.
4. Metis SG reserves the right to vary the charges contemplated under this Section C 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.
5. For the avoidance of doubt, any fees and charges referred to in this Section C is in respect of each Insurance Policy and each death benefit received made thereunder.

**Section D – Declaration and Signature**

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 Section C – 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:

- |  | YES                      | NA                       |
|--|--------------------------|--------------------------|
| • Proof of relationship where Settlor is NOT the Policy Owner              | <input type="checkbox"/> | <input type="checkbox"/> |
| • Proof of relationship where the Payor of premium is NOT the Policy Owner | <input type="checkbox"/> | <input type="checkbox"/> |

Plan Number

Grid of 10 boxes for Plan Number

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](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/
  - 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 am/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 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.

Full Name of Settlor  
(As in NRIC/FIN/Passport including any alias and other names)

Full Name of Joint Settlor (where applicable)  
(As in NRIC/FIN/Passport including any alias and other names)

Signature box for Settlor

Signature

Signature box for Joint Settlor

Signature

Date Signed box for Settlor

Date Signed

Date format: / /

Date Signed box for Joint Settlor

Date Signed

Date format: / /