

Will Nomination Request Form 遗嘱提名请求表格

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 a Will 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，指定为遗嘱的受益人，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.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. 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 Will's distributions to be received into the Trust Plan and only cash from the Will can be accepted into your Trust Plan.
4. Any cash distributions 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 cash distributions are received while the Trust Plan is within ICP, Metis SG reserves the right to apply the whole or any part of the cash distributions towards satisfying any regular contributions and/or additional regular contributions for the remaining ICP before purchasing any Units or making any distribution as aforementioned.
5. Metis SG expressly disclaims any responsibility for verifying the validity, legality, or enforceability of the Will. Metis SG shall not be held liable for any defects, irregularities, or disputes arising from the Will's validity. Metis SG will not initiate or participate in any legal proceedings to enforce the Will.

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. 您的信托计划必须生效，遗嘱的分配才能被接收进信托计划，而且只能接受来自遗嘱的现金进入您的信托计划。
4. Metis SG 收到的任何现金分配，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现金分配，Metis SG 保留在购买任何基金单位或进行上述分配之前，优先将全部或部分现金分配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。
5. Metis SG 明确声明不承担验证遗嘱的有效性、合法性或可执行性的责任。Metis SG 对因遗嘱的有效性引起的任何缺陷、违规或争议概不负责。Metis SG 不会发起或参与任何执行遗嘱的法律诉讼。

Part 2. Will Details 第二部份 遗产详情

2.1 Executor Details 执行人详情

Name of Executor 执行人姓名

Contact Number 联系号码 Email Address 电子邮件

Residential Address 居住地址

Country 国家 Postal Code 邮政编码

Expected cash Distribution 预期现金分配 Currency 货币

Remarks 说明

Plan Number 计划号码

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Part 2. Will Details (continued)
第二部份 遗产详情 (继续)

2.2 Testator Details 遗嘱人详细信息

Is the Settlor/ Joint Settlor the Testator?
委托人/联合委托人是否为遗嘱人?

- Yes, for Settlor 是, 对委托人
 Yes, for Joint Settlor 是, 对联名委托人
 No, please complete the Third-Party Payor Form and submit it along with this application form for our review.
 否, 请填写第三方付款人表格, 并将其与本申请表一并提交以供我们审核。

Part 3. Fees and Charges
第三部份 费用和收费

1. An administration charge will be imposed by Metis SG on the cash distribution received from the Will into your Trust Plan. The current administration charge is 1 percent of the cash distribution received, subject to a minimum of SGD300 and up to a maximum of SGD5,000.
 2. Any fees or charges imposed by the Executor in relation to the cash distribution from the Will to Metis SG will be borne in its entirety by the Settlor.
 3. Metis SG can only receive cash distributions from the Will and reserves the right to convert the cash received into any foreign currency for investments and any fees or charges imposed for the conversion will be deducted from the benefit received.
 4. 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.
 5. For the avoidance of doubt, any fees and charges referred to in this Part 3 is in respect of each cash distribution received under the Will.
1. Metis SG 将对从遗嘱中收到的现金分配征收管理费, 该费用为收到现金分配金额的 1%, 最低为 300 新加坡元, 最高为 5,000 新加坡元。
 2. 与遗嘱中现金分配到 Metis SG 相关的任何由执行人征收的费用或收费, 将由立遗嘱人全额承担。
 3. Metis SG 只能接收来自遗嘱的现金分配, 并保留将收到的现金转换为任何外币用于投资的权利, 任何与转换相关的费用或收费将从收到的收益中扣除。
 4. 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。
 5. 为避免疑义, 本第 3 部分中提及的任何费用和收费均是指每次根据遗嘱收到的现金分配。

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 will not be held responsible for any modifications, revocations or alterations made to the Will, or for any consequences arising therefrom.
6. I/We understand that Metis SG does not, by virtue of this nomination, assume any responsibility for the processing of any distribution under the Will.
7. I/We understand that I/we will be responsible for ensuring the validity, legality or enforceability of the Will. I/We understand that under no circumstances will Metis SG be responsible for verifying the validity, legality, or enforceability of the Will. Metis SG shall not be held liable for any defects, irregularities, or disputes arising from the Will's validity.
8. I/We understand that Metis SG will not initiate or participate in any legal proceedings to enforce the Will.
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 Executor of any change in Metis SG's contact details; or
 - b. inform Metis SG of the change in nomination.

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Part 4. Declaration and Signature (continued)

第四部份 申请人声明及签署 (继续)

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:
 - Third Party Payor Form where Settlor is NOT the Testator Yes NA
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.

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 不会对遗嘱的任何修改、撤销或更改负责，也不对由此产生的任何后果承担责任。
6. 我/我们明白，Metis SG 不会根据此提名承担处理遗嘱分配的任何责任。
7. 我/我们理解，我/我们将负责确保遗嘱的有效性、合法性或可执行性。我/我们理解，在任何情况下，Metis SG 都不负责核实遗嘱的有效性、合法性或可执行性。Metis SG 对因遗嘱的有效性而产生的任何缺陷、违规或争议不承担任何责任。
8. 我/我们了解 Metis SG 不会启动或参与任何执行遗嘱的法律程序。
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) 更新 Metis SG 联系详情的任何变更给执行人；或
 - b) 通知 Metis SG 提名变更，
 Metis SG 将不对我/我们（或任何其他）负责。

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

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：
 - 委托人不是立遗嘱人时的第三方付款人表格 是 不适用
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。

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)