

Metis SG CRS Self Certification Form - Individual Form

Important Notes

Metis Global (Singapore) Pte. Limited ("Metis SG") is required to collect certain information about your tax residency in order to comply with the Singapore Income Tax Act (Chapter 134) and related regulations including Income Tax (International Tax Compliance Agreements) (United States of America) Regulations 2015 (FATCA) and Income Tax (International Tax Compliance Agreements) (Common Reporting Standard) Regulations 2016 (CRS). If you are tax resident outside the country/jurisdiction where your account is held, we may need to give the national tax authority this information, along with information relating to your accounts. That may then be shared between different country/jurisdictions' tax authorities.

Please note that providing false or misleading information is an offence under the Singapore Income Tax Act (Chapter 134)

Section A: Individual Account Holder Information

Plan Number

Surname (As in NRIC/FIN/Passport) NRIC/FIN/Passport No.

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

Country of Birth Date of Birth / /

Residential Address

Postal Code Country State/Region

Section B: Declaration of Tax Residency

If you have any questions on how to define your tax residency status, please visit www.oecd.org/tax/automatic-exchange/ or speak to a professional tax adviser as we are not allowed to give tax advice.

- Are you a US Citizen, Green Card Holder or a person having US tax filing obligations? Yes No
- Are you a tax resident of Singapore?
 - Yes, I am solely a tax resident of Singapore and do not have a foreign tax residency. My Singapore TIN in my NRIC or FIN.
if your TIN is not your NRIC or FIN, please state it here:
 - No, I am currently a tax resident in the following list of countries/jurisdictions (including Singapore, if applicable and provide details below)

No.	Country(ies) or jurisdiction(s) of tax residence*	Tax Identification Number (TIN)	If TIN is not available, please Select the reason code (refer to Table 1 below)	If reason B is selected, please explain why you are unable to obtain a TIN
1.	<input type="text"/>	<input type="text"/>	<input type="radio"/> A <input type="radio"/> B <input type="radio"/> C	<input type="text"/>
2.	<input type="text"/>	<input type="text"/>	<input type="radio"/> A <input type="radio"/> B <input type="radio"/> C	<input type="text"/>
3.	<input type="text"/>	<input type="text"/>	<input type="radio"/> A <input type="radio"/> B <input type="radio"/> C	<input type="text"/>

*if you are a United States (U.S.) Citizen U.S resident for tax purposes, you are required to submit Form W-9.

Reason Code	Description
A	The jurisdiction where you are resident for tax purposes does not issue TINs to its residents.
B	You are unable to obtain a TIN. (Please explain why you are unable to obtain a TIN if you have selected this reason)
C	TIN is not required. (Only select this reason if the authorities of the jurisdiction of residence do not require the TIN to be disclosed)

Plan Number

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3. Is your residential address, mailing address or contact number different from your country(ies) of tax residence? Yes No

If yes, please select one of the following:

- Student at an education institution in the country of residence.
- Working in the country of residence for less than 6 months.
- On an educational or cultural exchange visitor program in the country of residence for less than 6 months.
- Regular travel between jurisdiction for work and home.
- Others, please specify:

Section C: Declaration

1. I agree and expressly consent that Metis SG shall have the right to provide my personal data and information to any government authorities, regulatory bodies and/or any other person(s) to fulfil its obligations under applicable tax regulations, including Singapore Income Tax Act (Chapter 134), the Foreign Account Tax Compliance Act ("FATCA") and the OCED Common Reporting Standard for Common Exchange of Financial Account Information ("CRS"). I understand that such disclosures may:
 - a) involve cross border transfer of personal data and information outside the jurisdiction;
 - b) be in respect to personal data and information provided in this form, or in any other document provided, or to be provided to Metis SG by me or from other sources; and
 - c) relate to personal data of the account holder(s) and any information about relevant Trust Plan(s).
2. I declare that all statements made in this form are, to the best of my knowledge and belief, correct and complete. I acknowledge that the information I provided in this form will supersede any previous information which I have disclosed to Metis SG with respect to all accounts which I am an account holder.
3. I undertake to inform Metis SG within 30 days if there is a change in circumstances that affects my tax residency status or causes the information in this form to be incorrect or incomplete. I shall provide Metis SG with an updated FATCA and CRS self-certification form within 90 days of such change in circumstances. I understand any false, misleading, or fraudulent information regarding my resident status for tax purposes may result in certain penalties.

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

Signature

Date Signed

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