

## Financial Declaration for Large Amount Contribution 大额供款财务声明书

**Plan Number 计划号码**

Please write down "/" or "N/A" in the box which is not applicable.

请在不适用的栏位划上斜线 ( / ) 或填写"N/A"。

<b>Part 1. Personal Details</b> 第一部份 详细个人资料	
<b>1.1 Personal Particulars 个人资料</b> <div style="display: flex; justify-content: space-between;"> <div style="width: 48%;"> <b>Name of Main Applicant</b> 主要申请人姓名: </div> <div style="width: 48%;"> <b>Name of Joint Applicant</b> 联名申请人姓名: </div> </div>	
<b>1.2 Source of Wealth 财富来源</b> How did you accumulate your wealth (i.e. your total assets)? You may choose more than one option. 您是如何积累财富的（即您的总资产）？您可以选择多个选项。	
<input type="checkbox"/> <b>Business or trade income</b> 商业或贸易收入	<input type="checkbox"/> <b>Salary or commission from current and/or past employment(s)</b> 目前和/或过去的就业工作的薪资或佣金收入
<input type="checkbox"/> <b>Inheritance and gifts</b> 遗产和赠与	<input type="checkbox"/> <b>Investments (shares, bonds, unit trusts, etc.)</b> 投资（股票、债券、单位信托等）
<input type="checkbox"/> <b>Sale of property, company, or other assets</b> 房地产、公司或其他资产的出售	<input type="checkbox"/> <b>Others, please provide details below:</b> 其他，请具体说明。 <div style="border: 1px solid black; height: 40px; margin-top: 5px;"></div>

<b>Part 2. Financial Details of Applicant(s) - Primary Employment / Business</b> 第二部份 申请人财务明细 - 主要职业 / 业务		
Details of Employment/Business 职业/业务详情	Main Applicant 主要申请人	Joint Applicant 联名申请人
2.1 Name of Company 公司名称		
2.2 Nature of Company's Business 公司业务性质		
2.3 Date of Employment / Company Incorporation (if you are the business owner) 受雇日期 / 公司成立日期（如您为企业家）		
2.4 Occupation Title 职位		
2.5 Position Held Since 自何时开始担任此职位		
2.6 Main Duties 主要职务		
2.7 Experience in this Field of Business 个人在此行业的经验年限		
2.8 Earned Income per annum 工作年收入		
2.9 Commission & Bonus 佣金及花紅		

Plan Number 计划号码                     

**Part 2. Financial Details of Applicant(s) - Primary Employment / Business (continued)**  
第二部份 申请人财务明细 - 主要职业 / 业务 (续)

Details of Employment/Business 职业/业务详情	Main Applicant 主要申请人		Joint Applicant 联名申请人	
2.10 Are you a shareholder of the Company? 您是否为公司的股东?	<input type="checkbox"/> Yes. Percentage of shares owned. 是。所持股份百分比。 <span style="border: 1px solid black; padding: 0 10px;"> </span> %	<input type="checkbox"/> No. 否。	<input type="checkbox"/> Yes. Percentage of shares owned. 是。所持股份百分比。 <span style="border: 1px solid black; padding: 0 10px;"> </span> %	<input type="checkbox"/> No. 否。
(if you are a shareholder) Please answer questions 2.11 – 2.15 (如您为股东) 请填写第 2.11 至 2.15 项。				
2.11 Capital 资本额				
2.12 No. of employees (Full time) 全职员工数目				
Financial Records of the Company 公司收益状况 In Currency 计价币别: <span style="border: 1px solid black; padding: 0 10px;"> </span>	Last Year 去年	2 Years Ago 前年	Last Year 去年	2 Years Ago 前年
2.13 Turnover 营业额				
2.14 Gross Profit 毛利				
2.15 Net Profit 净利				

**Part 3. Financial Details of Applicant(s) - Secondary Employment / Business (where applicable)**  
第三部份 申请人财务明细 - 次要职业 / 业务 (如适用)

Details of Employment/Business 职业/业务详情	Main Applicant 主要申请人	Joint Applicant 联名申请人
3.1 Name of Company 公司名称		
3.2 Nature of Company's Business 公司业务性质		
3.3 Date of Employment / Company Incorporation (if you are the business owner) 受雇日期 / 公司成立日期 (如您为企业家)		
3.4 Occupation Title 职位		
3.5 Position Held Since 自何时开始担任此职位		
3.6 Main Duties 主要职务		
3.7 Experience in this Field of Business 个人在此行业的经验年限		
3.8 Earned Income per annum 工作年收入		
3.9 Commission & Bonus 佣金及花紅		

Plan Number 计划号码

<b>Part 3. Financial Details of Applicant(s) - Primary Employment / Business (where applicable) (continued)</b> 第三部份 申请人财务明细 - 次要职业 / 业务 (如适用) (续)				
<b>Details of Employment/Business 职业/业务详情</b>	<b>Main Applicant 主要申请人</b>		<b>Joint Applicant 联名申请人</b>	
3.10 Are you a shareholder of the Company? 您是否为公司的股东?	<input type="checkbox"/> Yes. Percentage of shares owned. 是。所持股份百分比。 <span style="border: 1px solid black; display: inline-block; width: 40px; height: 15px;"></span> %  <input type="checkbox"/> No. 否。	<input type="checkbox"/> Yes. Percentage of shares owned. 是。所持股份百分比。 <span style="border: 1px solid black; display: inline-block; width: 40px; height: 15px;"></span> %  <input type="checkbox"/> No. 否。		
(if you are a shareholder) Please answer questions 3.11 – 3.15 (如您为股东) 请填写第 3.11 至 3.15 项。				
3.11 Capital 资本额				
3.12 No. of employees (Full time) 全职员工数目				
<b>Financial Records of the Company</b> 公司收益状况 In Currency 计价币别: <span style="border: 1px solid black; display: inline-block; width: 60px; height: 15px;"></span>	<b>Last Year</b> 去年	<b>2 Years Ago</b> 前年	<b>Last Year</b> 去年	<b>2 Years Ago</b> 前年
3.13 Turnover 营业额				
3.14 Gross Profit 毛利				
3.15 Net Profit 净利				

Plan Number 计划号码 

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Part 4. Assets (Excluding Primary Residential Property) 第四部份 资产 (不包括主要住宅物业)						
In Currency 计价币别:	Main Applicant 主要申請人		Joint Applicant 联名申請人			
5.1 Real estate assets 房地产资产						
Address of Property 1 物业 1, 所在地址:						
Purchase Price and Date 购买金额与购买日期	Amount 金额	M / 月 /	Y 年	Amount 金额	M / 月 /	Y 年
Current Estimated Value 现时估计市值						
Outstanding amount of Mortgage 未还清的按揭金额						
Address of Property 2 物业 2, 所在地址:						
Purchase Price and Date 购买金额与购买日期	Amount 金额	M / 月 /	Y 年	Amount 金额	M / 月 /	Y 年
Current Estimated Value 现时估计市值						
Outstanding amount of Mortgage 未还清的按揭金额						
5.2 Cash and Deposit in Bank 现金及银行存款						
5.3 Stock /Mutual Fund 股票 / 基金						
5.4 Others 其他 (please specify 請註明)						

Plan Number 计划号码

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**Part 5. Description of Source of Wealth for Main Applicant and Joint Applicant**

**第五部份 主要申请人财富来源说明**

Please describe your entire Source of Wealth journey, outlining how your total wealth (i.e. total assets) was accumulated from the beginning of your career to the present — including but not limited to employment or business income, investment gains, sale of assets or inheritance. For business owners, please also provide information on seed capital funding (i.e. how the business startup costs were financed or how the acquisition of business shareholdings was funded).

请描述您整个财富来源的过程，概述您从职业生涯开始至今是如何积累全部财富（即总资产）的——包括但不限于就业或经营收入、投资收益、资产出售所得或继承所得等。若您为企业主，请同时提供有关初始资金来源的信息（即创业启动资金的筹集方式，或购买企业股份的资金来源）。

**Part 6. Declaration and Authorisation by Applicant and Joint Applicant**

**第六部份 申请人声明和授权**

1. By submitting this form, I/We agree and consent to Metis Global (Singapore) Pte. Limited ("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:
- 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 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.

Plan Number 计划号码

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**Part 6. Declaration and Authorisation by Applicant and Joint Applicant (continued)**

**第六部份 申请人声明和授权 (继续)**

2. Metis SG may rely conclusively upon and accept any instructions received via email or Metis SG's online portal (collectively "electronic instructions") which is in good faith believed to be genuine instructions signed by us. Any transactions made according to electronic instructions shall be irrevocable and binding upon me, whether such electronic instructions have in fact been given with or without my 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) giving electronic instructions in our name or the authenticity of the signature appearing thereon or the validity of the electronic instructions.
3. We understand that sending electronic instructions is not a safe and reliable transmission method. Metis SG shall not, in any event, be liable to 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.
4. I/We declare and confirm as follows:
  - a. the answers given above statements and answers to all questions are true and correct to the best of my/our knowledge and belief.
  - b. I/We agree this form is supplemental to the application for the Plan, change or reinstatement in relation to the above Plan No. signed by me/us.
  - c. The declarations, agreements and authorizations made by me/us under the Applicant Declaration / Authorisation and Personal Data Use Statement Section of the Application Form shall also apply to this form; and
  - d. this declaration shall form the basis and become a part of the Plan to be issued/reinstated by Metis SG.
1. 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](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。
2. 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。
3. 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。
4. 我 / 我们声明并确认以下事项:
  - a. 上述所有陈述及问题的所有答案, 据我 / 我们所知所信, 均为事实的全部且确实无误;
  - b. 我 / 我们确认此表格是关于上述计划编号所签署的申请、计划变更或计划恢复申请的补充文件。
  - c. 载于申请书上的申请人声明及签名页, 以及收集个人资料声明部分中的声明、协议及授权, 均适用于此表格; 并且
  - d. 本声明是申请该计划的文件之一, 也作为 Metis SG 发出 / 恢复计划的依据。

Signature 签名

Full Name of Main Applicant  
主要申请人全名

Date Signed (DD/MM/YYYY) 签署日期 (日/月/年)

Signature 签名

Full Name of Joint Applicant (where applicable)  
联名申请人全名 (如适用)

Date Signed (DD/MM/YYYY) 签署日期 (日/月/年)

Plan Number 计划号码

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### Part 7. Relationship between Client and Business Partner

#### 第七部份申请人和业务合作伙伴代表之关系

Please provide details of how you came to know the applicant(s), including (i) how the applicant was introduced to you (e.g. referral, prior working relationship, networking event, family member); (ii) the duration of your relationship; and (iii) your understanding of the applicant's background and source of wealth activities (where applicable).

请提供您是如何认识申请人（们）的详细信息，包括：

(i) 申请人是如何被介绍给您的（例如：转介、之前的工作关系、社交活动、家庭成员等）；

(ii) 您与申请人关系的持续时间；

(iii) 您对申请人背景及其财富来源活动的了解（如适用）。

### Part 8. Declaration and Authorisation by Business Partner

#### 第八部份 业务合作伙伴代表声明和授权

1. I agree and confirm that to the best of my knowledge and belief the above statements and answers to the questions are true and complete.

1. 我同意并确认，据我所知所信，以上陈述和对问题的回答均真实且完整。

Signature 签名

--

Full Name of Business Partner Representative

业务合作伙伴代表全名

--

Date Signed (DD/MM/YYYY) 签署日期 (日/月/年)

--