

### Supporting Documents required under Specified Events

Specified Events	Supporting Documents
Death of Settlor	<p>1. Certified true copy of a Death Certificate For all deaths that occurred in Singapore, please certify the Death Certificate through your Financial Adviser. For overseas deaths (Singaporeans or Permanent Residents), please certify it at the Singapore Embassy/Notary Public of the country of death. For overseas deaths (Foreigners), please certify the Death Certificate at the Notary Public of the country of death.</p>
Activation of Contingent Investment Adviser (Death of settlor)	<p>1. Certified true copy of a Death Certificate For all deaths that occurred in Singapore, please certify the Death Certificate through your Financial Adviser. For overseas deaths (Singaporeans or Permanent Residents), please certify it at the Singapore Embassy/Notary Public of the country of death. For overseas deaths (Foreigners), please certify the Death Certificate at the Notary Public of the country of death.</p>
Activation of Contingent Investment Adviser (Incapacity of settlor)	<p>1. Certified true copy of a medical report certifying that the settlor does not have the ability to give reasoned consideration to financial or business matters</p> <p>(a) Requirements for medical reports issued in Singapore:</p> <ul style="list-style-type: none"> <li>(i) The medical report must be issued by a certified medical practitioner registered with the Singapore Medical Council.</li> <li>(ii) If handwritten, the medical report must be legible.</li> <li>(iii) The settlor's medical report must clearly state: <ul style="list-style-type: none"> <li>• Doctor's opinion on the settlor's mental capacity - medical reports that only provide medical jargon may be rejected.</li> <li>• Whether the settlor's mental incapacity is or is not permanent.</li> </ul> </li> </ul> <p>(b) Requirements for medical reports issued outside of Singapore:</p> <ul style="list-style-type: none"> <li>(i) Where the medical report is in a language other than English, it must be translated into English by a certified translator.</li> <li>(ii) If handwritten, the medical report must be legible.</li> <li>(iii) The settlor's medical report must clearly state: <ul style="list-style-type: none"> <li>• Doctor's opinion on the settlor's mental capacity - medical reports that only provide medical jargon may be rejected.</li> <li>• Whether the settlor's mental incapacity is or is not permanent.</li> </ul> </li> </ul>
No appointment of CIA	<p>As per T&amp;C clause 3.5, Metis does not have the power of investment and in the absence of a CIA, the status of your investments will remain status quo as Metis does not have the power to exercise the reserve powers of investment and asset management. You may appoint a CIA either at the point of application for Metis' trust plans or after the trust plan has come into force. The CIA also has the power to appoint or nominate a successor.</p>

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Distribution to beneficiaries (above 21yrs old)*	<p>Metis SG to accept:</p> <p>(a) the copy of the NRIC/FIN/Passport Form and billing proof<sup>^</sup>, provided the beneficiary is able to produce the original identity and billing proof; or</p> <p>(b) a CTC of the NRIC/FIN/Passport and billing proof<sup>^</sup>, provided that it is certified by a suitably qualified person (e.g. a notary public, a lawyer or certified public or professional accountant)</p>
Distribution to beneficiaries (below 21yrs old)*	<p>1. Metis SG will make the distribution to the minor's legal guardian</p> <p>2. The guardian must be physically present at Metis SG's registered office to request for the distribution, and present the following documents:</p> <p>(a) (where any settlor is alive and is a parent of the minor beneficiary) CTC of the minor's birth certificate + a copy of the minor's NRIC/FIN/Passport and billing proof<sup>^</sup>, provided they are able to produce the original NRIC OR a CTC of their NRIC/FIN/Passport and billing proof<sup>^</sup>, provided that it is certified by a suitably qualified person (e.g. a notary public, a lawyer or certified public or professional accountant);</p> <p>(b) (where any settlor is alive but is not a parent of the minor beneficiary) CTC of the minor's birth certificate + a copy of the guardian's and minor's NRIC/FIN/Passport and billing proof<sup>^</sup>, provided they are able to produce the original NRIC OR a CTC of their NRIC/FIN/Passport and billing proof<sup>^</sup>, provided that it is certified by a suitably qualified person (e.g. a notary public, a lawyer or certified public or professional accountant);</p> <p>(c) (where the settlor(s) are dead and is a parent of the minor beneficiary) CTC of the Will / Court Order appointing the guardian as guardian of the minor + a copy of the guardian's and minor's NRIC/FIN/Passport and billing proof<sup>^</sup>, provided they are able to produce the original NRIC OR a CTC of their NRIC/FIN/Passport and billing proof<sup>^</sup>, provided that it is certified by a suitably qualified person (e.g. a notary public, a lawyer or certified public or professional accountant); and</p> <p>(d) (where the settlor(s) are dead and is not a parent of the minor beneficiary) CTC of the minor's birth certificate + a copy of the guardian's and minor's NRIC/FIN/Passport and billing proof<sup>^</sup>, provided they are able to produce the original NRIC OR a CTC of their NRIC/FIN/Passport and billing proof<sup>^</sup>, provided that it is certified by a suitably qualified person (e.g. a notary public, a lawyer or certified public or professional accountant).</p>
Settlor(s) / Beneficiaries uncontactable	<p>Metis will take all reasonable endeavors to locate the settlor and beneficiaries.</p> <p>(a) In the event that the settlor cannot be located for a period of 6 months, he/she will be deemed to be Incapacitated under the terms of the trust plan.</p> <p>(b) In the event that the beneficiaries cannot be located and the monies remain unclaimed for 6 years, Metis SG will pay the monies into court pursuant to the Trust Companies Act</p>

<sup>^</sup>Examples of billing proof – utility bills, bank statements and letters issued by statutory or government bodies (dated within past 6 months) with letterhead, name, address and date clearly shown.

\*Metis SG CRS Self Certification Form is required for distribution to beneficiaries