

Metis Trust Plan Letter of Wishes Guide

The settlor is able to indicate his/her wishes in the Letter of Wishes for the Trust Assets to be distributed in the following options: (i) lump sum; (ii) regular; or (iii) deferred lump sum and/or deferred regular.

Step 1		Select One Specified Event for Distribution
		<ul style="list-style-type: none"> ○ Death of all Settlor(s) ○ Death or Incapacity of all Settlor(s)
Step 2		Select One Distribution Option
Distribution Immediately Upon Specified Event	○ Option 1	Lump Sum distribution ONLY <ul style="list-style-type: none"> ➤ Set proportion (%) for each beneficiary
	○ Option 2	Regular distribution ONLY <ul style="list-style-type: none"> ➤ Select distribution frequency (Monthly or Yearly) ➤ Set distribution amount (\$) for each beneficiary min. SGD1,000 ➤ Set proportion (%) for each beneficiary once the value of the Trust Fund falls below SGD 10,000 or is less than the amount to be distributed at the next distribution, the remaining Trust Fund will be distributed as a lump sum distribution
	○ Option 3 Type A	Lump Sum distribution ONLY <ul style="list-style-type: none"> ➤ Provide "indicative date" (for beneficiaries to receive payout immediately upon specified event - indicate today's date) ➤ Set distribution amount (\$) for each beneficiary min. SGD5,000 ➤ Set proportion (%) for each beneficiary for the remaining Trust Fund
Distribution on Deferred Date (A one-time servicing fee of SGD300 for activation of each deferred regular distribution or actual payment of each deferred lump sum will be applicable)	○ Option 3 Type B	Regular distribution ONLY <ul style="list-style-type: none"> ➤ Select distribution frequency (Monthly or Yearly) ➤ Provide "start date" (for beneficiaries to receive payout immediately upon specified event - indicate today's date) ➤ Set distribution amount (\$) for each beneficiary min. SGD1,000 ➤ Set proportion (%) for each beneficiary once the value of the Trust Fund falls below SGD 10,000 or is less than the amount to be distributed at the next distribution, the remaining Trust Fund will be distributed as a lump sum distribution
	○ Option 3 Type A + B	Lump Sum and Regular distribution For Lump Sum distribution <ul style="list-style-type: none"> ➤ Provide "indicative date" (for beneficiaries to receive payout immediately upon specified event - indicate today's date)

		<ul style="list-style-type: none"> ➤ Set distribution amount (\$) for each beneficiary min. SGD5,000 <p>For Regular distribution (servicing fees is SGD300 for each "start date" deferred regular distribution to a beneficiary)</p> <ul style="list-style-type: none"> ➤ Select distribution frequency (Monthly or Yearly) ➤ Provide "start date" (for beneficiaries to receive payout immediately upon specified event - indicate today's date) ➤ Set distribution amount (\$) for each beneficiary min. SGD1,000 ➤ Set proportion (%) for each beneficiary once the value of the Trust Fund falls below SGD 10,000 or is less than the amount to be distributed at the next distribution, the remaining Trust Fund will be distributed as a lump sum distribution
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