

**Application for Additional Regular Contribution/ Single Contribution/ Top-Up Contribution**

I/We would like to submit the following transaction request to Metis Global (Singapore) Pte. Limited ("Metis SG") for the purposes of effecting the following transaction to my/our Trust Plan

**Plan Number**

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**Section A – Important Notes**

1. Terms defined in the Deed shall have the same meaning when used herein, except to the extent that the context requires otherwise.
2. Please log into your account via our Metis SG website to view your Plan Details.
3. Please seek advice from your Financial Adviser before submitting any application for Additional Regular / Single / Top-Up Contribution. Your Financial Adviser will 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.
4. The Additional Regular / Additional Single / Top Up Contributions will be allocated to purchase Units in accordance with our latest record of your Asset Choice selection.
5. Metis SG shall not be liable for losses of any kind which may be incurred as a result of or in respect of the provision of the Plan by Metis SG in accordance to your instructions or the Deed unless due to the gross negligence or willful default of Metis SG or any other person appointed or employed by it.

Important Notes which are only applicable to SapphirePRO Trust Plan

*(For Additional Regular Contribution)*

6. Each Additional Regular Contribution must take effect at least five years before the Trust Plan Contribution Payment Term ("CPT") Maturity Date.
7. The frequency and payment method of each Additional Regular Contribution must follow the Regular Contribution of the Trust Plan. The minimum Additional Regular Contribution by frequency is shown in the following table.

**Minimum Additional Regular Contribution**

Currency	Monthly	Quarterly	Semi-Annually	Annually
SGD	100	300	600	1,200

8. Each Additional Regular Contribution will have its own ICP that is determined by the CPT of the relevant Additional Regular Contribution and an Exit Charge will be imposed upon termination of the Trust Plan and/or non-payment of the relevant Additional Regular Contribution during the relevant ICP. Please refer to the SapphirePRO Terms and Conditions for more details on Exit Charges.
9. Any Additional Regular Contributions will cease in the event of non-payment of your Regular Contributions beyond the Grace Period (if any).

*(For Additional Single Contribution)*

10. Additional Single Contributions can only be added to an existing Trust Plan at any time before Trust Plan CPT Maturity Date when the Trust Plan is in force but cannot be accepted as standalone plans. Additional Single Contributions should be separated from any Regular Contributions.
11. The minimum Additional Single Contribution is SGD 3,000.
12. Additional Single Contributions can be paid by Bank Transfer or Cheque. Payment through credit card is not accepted.

Important Notes which are only applicable to CitrinePRO Trust Plan

13. Top-Up Contributions can only be added to an existing Trust Plan at any time before the Settlor or the youngest Settlor (in the case of joint application) reaches the age of 80.
14. The minimum Top-Up Contribution is SGD10,000.
15. Top-Up Contributions can only be paid by Bank Transfer or Cheque. Payment through credit card is not accepted.
16. Each Top-Up Contribution will have its own Exit Charge Waiver Date and an Exit Charge will be imposed upon any Withdrawal on or before the relevant Exit Charge Waiver Date that results in the Trust Plan Value being less than the Minimum Trust Plan Value. Please refer to the CitrinePRO Terms and Conditions for more details on Exit Charges.
17. The receipt of a Top-Up Contribution will automatically cease any on-going Regular Withdrawals.

Plan Number

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**Section B: Details of Application of Additional Regular Contribution/Single Contribution/Top-Up Contribution**

**Additional Regular Contribution**

I/We request that my/our regular contribution will be increased as detailed below for the remaining contribution payment term of my/our Plan.

Additional Regular Contribution details: (in SGD)

Current Regular Contribution Amount	Additional Regular Contribution Amount	Total Regular Contribution Amount

**Additional Single Contribution/Top-Up Contribution**

I/We request to make an Additional Single Contribution /Top-Up Contribution as detailed below into my/our Plan.

Additional Single Contribution/Top-Up Contribution details:(in SGD)

Additional Single Contribution/Top-Up Contribution Amount

**Declaration by Financial Adviser(s)**

I have explained the Trust Plan Terms and Conditions to the client(s).

Taking into consideration the reason(s) for the requested application and client(s) investment and risk profile, my advice is as follows:

To proceed with the requested application as it is aligned with Client(s) investment and risk profile.

Full Name of Financial Adviser

Signature

Date Signed  /  /

(where applicable)

Full Name of Supervisor

Signature

Date Signed  /  /

**Plan Number**

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**Declaration By Applicant(s)**

1. I/We confirm that I/we have read and verified the information in this document (including the Important Notes section).
2. I/We understand that Metis SG will notify me/us upon my/our successful application to make an Additional Regular / Single / Top-Up Contribution.
3. I/We understand and agree that Metis reserve the right to decline my/our application at its sole and absolute discretion and will not be required to disclose the reason(s) for their decision.
4. 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 me/us. Any transactions made according to electronic instructions shall be irrevocable and binding upon me/us, whether such electronic instructions 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) giving electronic instructions in my/our name or the authenticity of the signature appearing thereon or the validity of the electronic instructions.
5. I/We understand that sending electronic instructions 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.
6. I/We understand, acknowledge and agree that, as a result of my/our successful application for the Additional Regular / Single / Top-Up Contribution, Metis SG will pay any relevant intermediaries involved, commission and/or referral fee and/or any other remunerations, if any, during the continuance of the Trust Plan. I/We further understand that the above arrangement is necessary for Metis SG to proceed with this application.
7. I/We agree that Metis SG's legal obligations will only come into effect when Metis SG accepts this application and I/we have paid the Additional Regular / Single / Top-Up Contribution.
8. I/We understand in the event that I/We no longer wish to continue the Additional Regular Contribution within the ICP of the Additional Regular Contribution, Metis SG may either distribute the remaining Initial Account Value in respect of the remaining Initial Units purchased by the Additional Regular Contribution or transfer the remaining Initial Units purchased with the Additional Regular Contribution into the Accumulation Account.
9. I/We confirm that:
  - a) I/We am/are not an undischarged bankrupt and no bankruptcy application or order has been made against me/us;
  - b) I/We do not contemplate filing for relief under the provisions of any applicable bankruptcy laws, nor am/are I/We involved in any situation that I/We reasonably anticipate would cause me to file for relief under the applicable bankruptcy laws in the future;
  - c) following the transfer of my/our assets to the trust structure, I/We will be solvent and able to pay my/our reasonably anticipated debts (including any claims or lawsuits against me/us) as they become due from the balance of my/our assets after such transfer;
  - d) I/We have good title to, rights and interests in all assets which are to be transferred into the trust structure (and there is no defect in such title, rights or interest) and there are no charges, liens, encumbrances or other security interests or third-party rights or interests or other restrictions affecting any of such assets; and
  - e) I/We have full rights, power, authority and the legal capacity to transfer all assets which are to be transferred into the trust structure.
10. I/We declare that any funds and assets I/We place with Metis, and any profits generated from them, comply with the tax laws of the countries where I/we am/are a resident of, and a citizen of.
11. I/We understand that Metis is a licensed Trust Company in Singapore. The courts in Singapore shall have exclusive jurisdiction to settle any disputes and claims that arise out of, or in connection with this application. I/We fully understand the risks (including but not limited to the counterparty risks, market and financial risks associated with assets in the Trust Plan) and merits, as well as the legal, tax and accounting characteristics and consequences of asset allocation in the Trust Plan. I/We have consulted my/our own financial, accounting, tax, legal and/or other advisors as I/we deem necessary or appropriate.

**Plan Number**

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I/We confirm that my/our signature in this application form is/are to confirm all declarations and confirmations in this application form and my/our acceptance of all the terms and conditions in the Deed which shall be binding on me/us.

Full Name of Main Settlor

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Signature

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Date Signed

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*(where applicable)*

Full Name of Joint Settlor

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Signature

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Date Signed

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