

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

Plan Number

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 Trust Plan Number:

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### Section A Important Notes

- Terms defined in the Deed shall have the same meaning when used herein, except to the extent that the context requires otherwise.
- Please log into your account via our Metis SG website to view your Trust Plan Details.
- Metis SG does not offer any financial advisory services. You are encouraged to seek advice from your Financial Adviser (if any) 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.
- 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.
- 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 Trust 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)*

- Each Additional Regular Contribution must take effect at least five years before the Trust Plan Contribution Payment Term ("CPT") Maturity Date.
- 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

- Each Additional Regular Contribution will have its own Initial Contribution Period ("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.
- 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)*

- 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 Trust Plans. Additional Single Contributions should be separated from any Regular Contributions.
- The minimum Additional Single Contribution is SGD 3,000.
- 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*

- 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.
- The minimum Top-Up Contribution is SGD10,000.
- Top-Up Contributions can only be paid by Bank Transfer or Cheque. Payment through credit card is not accepted.
- 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.
- 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 Trust 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 /Top-Up Contribution as detailed below into my/our Trust Plan.

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

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**Payor Details**

The Payor refers to the person making the contribution payments. Is the Settlor the Payor?

- Yes  No, please complete the Third-Party Payor Form and submit it along with this application form for our review

**Source of Funds (If the Settlor is the Payor)**

What is the source of funds used to pay the contributions? You may choose more than one option.

- Business or trade income     Salary or commission  
 Inheritance     Personal savings, if currently not employed, please provide details below (example: previous employment, allowance from family members, etc.)  
 Sale of assets     Others, please provide details below

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**Purpose of Additional Regular Contribution/Single/ Contribution / Top-Up Contribution**

Please confirm that the purpose of the contribution is to provide a source of financial security for the beneficiaries under this Trust.

- Yes

**Plan Number**

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**Declaration by Financial Adviser(s) (if any)**

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 SG 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 communications received via email or Metis SG's online portal (collectively "**electronic communications**") which is in good faith believed to be genuinely endorsed/signed by me/us. Any transactions made according to electronic communications shall be irrevocable and binding upon me/us, whether such electronic communications 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) initiating the electronic communications in my/our name or the authenticity of the signature appearing thereon or the validity of the electronic communications.
5. I/We understand that sending electronic communications 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 SG 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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12. By submitting this form, I/We agree and consent to 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:
- a) processing this form and providing me/us with your products and services as well as the services of third-party service providers;
  - b) administering and/or managing our relationship and/or our account(s) with you; and/or
  - c) any of the purposes set out in the Privacy Policy.

I/We further represent and warrant that:

- a) all of the information provided by me/us to you (including without limitation personal particulars and contact information) is accurate and complete; and
- b) 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
- c) 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.

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 Settlor**  
(As in NRIC/FIN/Passport including any alias and other names)

**Full Name of Joint Settlor (where applicable)**  
(As in NRIC/FIN/Passport including any alias and other names)

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Signature

Signature

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Date Signed 

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Date Signed 

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