

UPDATE OF PERSONAL PARTICULARS AND MARKETING CONSENT FORM

Plan Number

I would like to submit the following form to Metis Global (Singapore) Pte. Limited ("Metis SG"), for the purposes of effecting the following amendments to Trust Plan Number:

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Note:
Please complete this form and send it to service.sg@metisgl.com using your registered email with Metis SG.
Please tick the required boxes, fill in the details and sign next to any amendments.

A. Change of Contact Details

Change of Residential Address (Please attach address proof as set out in the notes below)

New Address Postal Code

Change of Correspondence Address

Only for the Trust Plan number stated above

New Address Postal Code

Change of Contact Number

New Mobile Number New Home Number

New Office Number Extension Number

Change of Email Address

Note

- By default, all of your existing plans will be updated based on the details provided above. If you wish for Metis SG to only update your correspondence address for the Trust Plan number stated above, please tick the box "Only for the Trust Plan number stated above".
- If your current residential/ correspondence address is different from the country/region you submitted before or your tax residency has been changed, please submit a "Metis SG CRS Self Certification Form" together with this application
- Please complete separate forms for each settlor who wishes to change their contact details in any Joint Application Trust Plan.
- Please enclose a certified true copy of your identity card or billing proof that it is certified by a suitably qualified person (e.g. a notary public, a lawyer or certified public or professional accountant). Examples of billing proof – utility bills, bank statements and letters issued by statutory or government bodies (dated within past 3 months) with letterhead, name, address and date clearly shown.

B. Change of Personal Particulars

Change of Name

Given Name Surname
(As in NRIC/FIN/Passport including any alias and other names) (As in NRIC/FIN/Passport)

Change of Nationality Nationality

Change of Passport Details Passport Number Expiry Date / /

- For all change of name request: Please provide a certified true copy of your identity card (certified by a suitably qualified person (e.g. a notary public, a lawyer or certified public or professional accountant)) showing your new name and supporting legal documentation regarding your change of name.
- For all change of nationality request: Please provide a certified true copy of your identity card or passport (certified by a suitably qualified person (e.g. a notary public, a lawyer or certified public or professional accountant)) showing your new nationality. Please also submit a "Metis SG CRS Self Certification Form" together with this application.
- For change of nationality request to US citizenship: If change to US citizenship, please complete IRS Form W-9.
- For all change of passport details request: Please provide a certified true copy of your passport (certified by a suitably qualified person (e.g. a notary public, a lawyer or certified public or professional accountant)) showing your new passport details.



Plan Number

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C. Change of Financial Adviser I would like to change my Financial Adviser

Name of Financial Adviser

Mobile Number

RNF Number

D. Politically Exposed Person (PEP) Declaration A Politically Exposed Person (PEP) is a natural person who is, or has been entrusted with prominent public functions whether in Singapore, a foreign country or an international organisation. Prominent public function includes the roles held by head of state, a head of government, government ministers, senior civil or public servants, senior judicial or military officials, senior executives of state-owned corporations, senior political party officials, members of the legislature, and senior management of international organisations.

If you, or any of the beneficiaries, are a PEP or a family member* or close associate** of a PEP*, you must disclose this information.

* A "family member" means a parent, step-parent, child, step-child, adopted child, spouse, sibling, step-sibling and adopted sibling of the PEP.

** A "close associate" means a natural person who is closely connected to a PEP, either socially or professionally.

Name of PEP

Title of PEP

Name of person related to PEP

Relationship to PEP

E. Personal Data Use Statement Marketing Consent

I hereby consent to Metis SG (including Representatives of Metis SG) and their service providers to contact me (even though my telephone numbers) are already registered or may be registered on the National Do Not Call Registry, by way of:

 Voice Call Mail/Email/Any other avenues of marketing activities SMS

for marketing purposes and provide me/us with marketing, advertising and promotional information, materials and/or documents relating to products and services marketed by Metis SG or its related companies.

 I do not wish to receive marketing updates/information about products and services distributed, marketed and/or introduced by Metis SG and its authorised representatives**F. Change of Signature** New Signature Specimen

Please sign below:

G. Others Please specify any other personal information that you would like the change.

Plan Number

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Section H – Declaration and Authorisation

1. 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 ("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.
2. I agree and expressly consent that Metis SG shall have the right to provide my personal data and information to any government authorities, regulatory bodies and/or any other person(s) to fulfil its obligations under applicable tax regulations, including Singapore Income Tax Act (Chapter 134), the Foreign Account Tax Compliance Act ("FATCA") and the OCED Common Reporting Standard for Common Exchange of Financial Account Information ("CRS"). I understand that such disclosures may:
 - a) involve cross border transfer of personal data and information outside the jurisdiction;
 - b) be in respect to personal data and information provided in this form, or in any other document provided, or to be provided to Metis SG by me or from other sources; and
 - c) relate to personal data of the applicant(s) and any information about relevant Trust Plan(s).
3. I undertake to inform Metis SG within 30 days if there is a change in circumstances that affects my tax residency status or causes the information in this form to be incorrect or incomplete. I shall provide Metis SG with an updated FATCA and CRS self-certification form within 90 days of such change in circumstances. I understand any false, misleading, or fraudulent information regarding my resident status for tax purposes may result in certain penalties.
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. 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 my name or the authenticity of the signature appearing thereon or the validity of the electronic instructions.
5. I understand that sending electronic instructions is not a safe and reliable transmission method. Metis SG shall not, in any event, be liable to me 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 agree to indemnify Metis SG and any person appointed or employed by it against all claims, liabilities, damages, losses, costs and expenses of any kind which may be incurred by any of them and all actions or proceedings which may be brought by or against any of them in connection with the requests specified in this form unless due to the negligence or willful default of Metis SG or any other person appointed or employed by it.
7. I understand that the updates will take effect only after Metis SG's acceptance and completion of the request and Metis SG will notify me of the effective date of the change.

Plan Number

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Full Name of Applicant
(As in NRIC/FIN/Passport including any alias and other names)

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Signature

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Date

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