Plan Alternation Form

Plan Number

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

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.

☐ Section A – Change of Payment Method

I/We would like to change our Trust Plan payment method to:

☐ Bank Transfer ☐ Giro

Note
If you have selected "Giro", please refer to the "Contribution Payment Guideline" available on Metis SG's website to set up your Giro arrangement. Please continue to make contributions as per the previous payment method until receipt of Metis SG's notification that your Giro arrangement had been completed.

☐ Section B – Change of Contribution Frequency

I/We would like to change our contribution frequency and understand that all future contribution amounts will be adjusted in proportion to the new Contribution frequency. The new contribution frequency will be:

☐ Monthly ☐ Quarterly ☐ Semi Annually ☐ Annually

Note
For change of Contribution frequency from higher frequency (e.g. monthly) to lower frequency (e.g. annually), you may need to pay a pro-rated Contribution up to the next Contribution due date.

☐ Section C – Decrease/Cessation of Regular/Additional Regular Contribution

☐ I/We would like to decrease my/our Regular contribution to SGD

☐ I/We would like to decrease my/our Additional Regular contribution to SGD

☐ I/We would like to cease my/our Regular contribution.

☐ I/We would like to cease my/our Additional Regular contribution.

Note
1. Please seek advice from your Financial Adviser before making any withdrawal or encashment of your Plan. 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.
2. The Regular Contribution and Additional Regular Contribution can only be reduced/cease after the relevant initial contribution period of the Regular Contribution and Additional Regular Contribution.
3. For details on the minimum Contribution requirements, please refer the Terms and Conditions of the Trust Plan.
4. For the avoidance of doubt, your Asset Choice selection will remain unchanged even after the reduction of your Regular Contribution and/or Additional Regular Contribution.

☐ Section D – Reinstatement of the Plan

I/We would like to reinstate my/our Plan and resume making contributions by:

☐ Bank Transfer ☐ Giro

In addition:

☐ I/We would not make any repayment of outstanding contribution.

☐ I/We would like to settle the outstanding contribution. (Please complete Section E)

Note
1. Reinstatement of Plans is not applicable for terminated Plans.
2. If you have selected Giro arrangement, please refer to the "Contribution Payment Guideline" available on Metis SG's website to set up your Giro arrangement.

☐ Section E – Settlement of Outstanding Contribution

I/We would like to settle month(s) of outstanding contributions amounting to SGD

by Telegraphic Transfer / PayNow.

Note
1. Please log into your account via Metis SG's website to assess your outstanding contributions for full/partial settlement.
2. Repayment of outstanding contributions cannot be made after the Trust Plan CPT Maturity Date.
3. Please refer to the "Contribution Payment Guideline" available on Metis SG's website for instructions on Telegraphic transfer / PayNow.

☐ Section F – Other Service Request

Plan Number

Section G – Declaration and Authorisation

1. 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.
2. 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.
3. I / We understand that the request(s) will be take effect only after Metis SG's acceptance and approval of the request(s) and Metis SG will notify me/us of the effective date of the change.

Full Name of Settlor

Signature

Date Signed / /

(where applicable)

Full Name of Joint Settlor

Signature

Date Signed / /