

Trust Plan Alteration Request Form

Plan Number

I/We would like to submit the following request 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.

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

- Metis SG does not offer any financial advisory services. You are encouraged to seek advice from your Financial Adviser (if any) before making any changes to your Trust Plan. Your Financial Adviser should 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 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.
- For details on the minimum Contribution requirements, please refer the Terms and Conditions of the Trust Plan.
- 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 Trust Plan

I/We would like to reinstate my/our Trust 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

- Reinstatement of Trust Plans is not applicable for terminated Plans.
- 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

- Please log into your account via Metis SG's website to assess your outstanding contributions for full/partial settlement.
- Repayment of outstanding contributions cannot be made after the Trust Plan CPT Maturity Date.
- 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

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Section G – Declaration and Authorisation

1. 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.
2. 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.
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.
4. 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.

I/We confirm that my/our signature in this Request is/are to confirm all declarations and confirmations in this Request 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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