

Application for Additional Regular / Single Contribution 增加定期定额/单笔额外供款申请

Plan Number 计划号码

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.

我 / 我们希望向安智环球服务（新加坡）("Metis SG")提交以下请求，以对我 / 我们的信托计划进行以下修改：

Note 注意

Please complete this form and send it to service.metissg@metisgl.com using your registered email with Metis SG.
请填写此表格，并使用您在 Metis SG 注册的电子邮件发送至 service.metissg@metisgl.com。

Please tick the required boxes, fill in the details and sign next to any amendments.
请勾选所需的选项，填写详细信息，并在任何修改旁边签名。

The Chinese translation of this form is for reference only. In case of any discrepancies between the Chinese and English versions, the English version shall prevail.

本表格中文翻译谨供参考。若中文版与英文版间有任何歧异，则以英文版为准。

Part 1. Important Notes

第一部份重要事项

- 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.
- 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.
- 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 below.
- 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 JadePRO 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 USD 10,000 / HKD 80,000 / SGD 14,000.
- Additional Single Contributions can be paid by Bank Transfer. Payment through credit card is not accepted.

- 在本契约中定义的术语应具有相同的含义，除非上下文另有要求。
- 请通过我们的 Metis SG 网站登录您的账户以查看您的信托计划详情。
- Metis SG 不提供任何财务顾问服务。在提交任何额外定期/一次性/补充捐款申请之前，建议您寻求您的财务顾问（如有）的建议。您的财务顾问将能够解释您决定的影响，并根据您的投资目标、财务状况、需求以及任何适用的费用和收费向您提供适当的建议。
- Metis SG 不对因按照您的指示或契约提供信托计划而可能发生的任何类型的损失负责，除非这些损失是由于 Metis SG 或其任命或雇用的任何其他人严重疏忽或故意失职所造成的。
- 每项增加定期定额供款必须在信托计划供款年期（"CPT"）到期日之前至少生效五年。
- 每项增加定期定额供款的频率和支付方式必须遵循信托计划的定期供款。以下表格显示了按频率计算的最低增加定期定额金额。
- 每项增加定期定额供款将有其自己的首初供款期（"ICP"），该期限由相关增加定期定额的供款年期（CPT）决定，并且在信托计划终止和/或在相关 ICP 期间未支付相关增加定期定额供款时，将收取退出费用。有关退出费用的更多详细信息，请参阅 JadePRO 条款和条件。
- 如果在宽限期（如适用）后未支付您的定期定额供款，则所有增加定期定额供款将停止。

Plan Number 计划号码

Part 1. Important Notes (continued)
第一部份重要事项(继续)

(对于单笔额外供款)

9. 单笔额外供款只能在信托计划有效时的信托计划供款年期之前添加到现有信托计划中，但不能作为单独的信托计划接受。单笔额外供款应与任定期定额供款分开。
10. 最低单笔额外供款为 10,000 美元/80,000 港币/14,000 新加坡元。
11. 单笔额外供款可通过银行转账支付。不接受信用卡支付。

Minimum Additional Regular Contribution 最低增加定期定额供款

Currency 货币	Monthly 每月	Quarterly 每季	Semi-Annually 每半年	Annually 每年
USD	200	600	1,200	2,400
HKD	1,400	4,200	8,400	16,800
SGD	280	840	1,680	3,360

Part 2. Details of Application of Additional Regular / Single Contribution
第二部份 增加定期定额/单笔额外供款申请详情

Additional Regular Contribution 增加定期定额供款

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.

我 / 我们请求将我的/我们的定期定额供款按照以下详细信息增加，以适用于我/我们的信托计划的剩余供款年期。

Additional Regular Contribution details: USD HKD SGD

增加定期定额供款详情：

Current Regular Contribution
Amount

当前定期定额供款金额

Additional Regular Contribution
Amount

增加定期定额供款金额

Total Regular Contribution Amount

总定期定额供款金额

Additional Single Contribution 单笔额外供款

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

我 / 我们请求按照以下详细信息向我的/我们的信托计划进行单笔额外供款。

Additional Single Contribution details: USD HKD SGD

单笔额外供款供款详情：

Payor Details 方供款人资料

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

供款人是指进行供款支付的个人。委托人是否为供款人？

- Yes 是 No, please complete the Third-Party Payor Form and submit it along with this application form for our review 不，请填写第三方供款人表格并与本申请表一并提交以供我们审核。

Source of Funds (If the Settlor is the Payor) 资金来源 (如果委托人是供款人)

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

支付后续出资的资金来源是什么？您可以选择多个选项。

- | | |
|---|--|
| <input type="checkbox"/> Salary or commission 薪金或收入 | <input type="checkbox"/> Personal savings, if currently not employed, please provide details below:
(example: previous employment, allowance from family members, etc.)
累积储蓄及投资。如果目前没有就业，请在下面提供详细资讯：
(例如：以前的就业情况、家庭成员的津贴等)。 |
| <input type="checkbox"/> Inheritance 继承遗产 | <input type="checkbox"/> Business or trade income 业务所得 |
| <input type="checkbox"/> Sale of assets 出售资产 | <input type="checkbox"/> Others, please provide details below 其他，请具体说明。 |

Plan Number 计划号码

Part 2. Details of Application of Additional Regular / Single Contribution (continued)

第二部份 增加定期定额/单笔额外供款申请详情(继续)

Purpose of Additional Regular Contribution/Single Contribution

增加定期定额/单笔额外供款的目的

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

请确认该供款的目的是为本信托下的受益人提供财务保障来源。

Yes 是

Part 3. Asset Allocation for Total New Regular Contribution / Additional Single Contribution

第三部份 总定期定额/单笔额外供款的资产配置

I have previously opted for the Servicing and Consulting service under this Plan. I/We would like to continue the same service and appoint the same Advisor
在本计划下已选择了服务与咨询服务。我 / 我们希望继续该服务并任命相同的顾问。

I/We would like to Appoint / Change / Terminate the advisory service and allocate my/our contribution according to the new instruction on Appointment/Change/Termination of Servicing and Consulting Services Service Form[#].
我 / 我们希望 任命 / 更改 / 终止顾问服务，并根据新指示对服务与咨询服务进行供款分配，具体请参见“委任/更改/终止服务与咨询服务申请书”[#]。

[#] Please attach the "Appointment/Change/Termination of Servicing and Consulting Services Service Form" with this application.
请将“委任/更改/终止服务与咨询服务申请书”与本申请一并附上。

My/Our asset allocation remains the same under this Plan as before.
在本计划下，我/我们的资产配置与之前保持不变。

Revised contribution allocation for my/our new total regular contribution or additional single contribution as stated below.
我 / 我们的新总定期定额或单笔额外供款的修订供款分配如下

No. 序 號	Fund Code(s) 资产代号	Fund Name 资产名称	Allocation % 资产分配百分比%
1.			
2.			
3.			
4.			
5.			
Total 合计			100%

Note 注意

- Please ensure the assets you selected are available in the latest "International Asset Selection".
请确保您选择的资产在最新的“国际资产选择”中可用。
- Please be aware of the minimum required amount on each asset.
请注意每项资产的最低要求金额。
- The total percentage must be equal to 100%. We can only accept whole percentages for each asset allocation.
总百分比必须等于100%。我们只能接受每项资产分配的整数百分比。

Part 4. Declaration and Authorisation

第四部份声明和授权

- I/We confirm that I/we have read and verified the information in this document (including the Part on Important Notes).
- I/We understand that Metis SG will notify me/us upon my/our successful application to make an Additional Regular / Single Contribution.
- 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.
- 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 us. 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 me/our name or the authenticity of the signature appearing thereon or the validity of the electronic instructions.

Plan Number 计划号码

--	--	--	--	--	--	--	--	--	--

Part 4. Declaration and Authorisation (continued)

第四部份声明和授权(继续)

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 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 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.
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 ("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 /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.

Plan Number 计划号码

--	--	--	--	--	--	--	--	--	--

Part 4. Declaration and Authorisation (continued)
第四部份声明和授权(继续)

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.

1. 我/我们确认已阅读并核实本文件中的信息（包括重要事项部分）。
2. 我/我们理解Metis SG将在我/我们成功申请进行增加定期定额/单笔额外供款申请时通知我/我们。
3. 我/我们理解并同意Metis SG保留全权拒绝我/我们申请的权利，并且不需要披露其决定的理由。
4. Metis SG 可以完全依赖并接受通过电子邮件或 Metis SG 在线门户收到的任何指示（统称为“电子指示”），这些指示被善意地认为是我 / 我们签署的真实指示。根据电子指示进行的任何交易对我 / 我们均为不可撤销和具有约束力的，无论这些电子指示实际上是否是在我 / 我们的授权、知情或同意下给予的。在任何情况下，Metis SG 均不承担任何询问或验证以我 / 我们名义发出电子指示的人员身份、所示签名的真实性或电子指示有效性的义务。
5. 我 / 我们理解，发送电子指示并不是一种安全可靠的传输方式。在任何情况下，Metis SG 对我 / 我们因任何网络或电话线路故障、任何不可控事件或其他超出 Metis SG 控制范围的情况而产生的任何责任、损失、损害或费用均不承担责任。
6. 我/我们理解、承认并同意，由于我/我们成功申请增加定期定额/单笔额外供款，Metis SG将在信托计划持续期间向任何相关中介支付佣金和/或介绍费及/或其他报酬（如适用）。我/我们进一步理解上述安排是Metis SG继续处理此申请所必需的。
7. 我/我们同意，Metis SG的法律义务仅在Metis SG接受此申请并且我/我们已支付增加定期定额/单笔额外供款时生效。
8. 我/我们理解，若我/我们不再希望在增加定期定额的首初供款期间继续进行增加定期定额，Metis SG可以选择分配与增加定期定额购买的剩余首初单位相关的首初账户价值，或将用增加定期定额购买的剩余首初单位转入累积账户。
9. 我/我们确认：
 - a. 我/我们并非未解除破产的破产人，且未对我/我们提出破产申请或作出破产裁定；
 - b. 我/我们不打算根据任何适用的破产法申请救济，也未涉及任何我/我们合理预期将导致我/我们在未来根据适用的破产法申请救济情况；
 - c. 在我/我们的资产转入信托结构后，我/我们将具备偿债能力，并能够按期支付我/我们合理预期的债务（包括对我/我们的任何索赔或诉讼），这些债务将在此转让后从我/我们的资产余额中到期；
 - d. 我/我们对所有将转入信托结构的资产拥有合法的所有权、权利和权益（且该所有权、权利或权益没有缺陷），并且没有任何对这些资产的抵押、留置权、负担或其他担保权益、第三方权利或利益或其他限制；以及
 - e. 我/我们拥有完整的权利、权力、授权和法律能力，将所有将转入信托结构的资产进行转让。
10. 我/我们声明，我/我们在Metis SG 处放置的任何资金和资产，以及由此产生的任何利润，均符合我/我们作为居民和公民所在国家的税法。
11. 我/我们明白，Metis SG 是新加坡一家持牌信托公司。新加坡的法院将对因本申请引起的或与之相关的任何争议和索赔拥有独占管辖权。我/我们充分理解相关风险（包括但不限于信托计划中资产所涉及的对对手方风险、市场风险和财务风险）及其优缺点，以及信托计划中资产配置的法律、税务和会计特征和后果。我/我们已根据认为必要或适当的情况咨询了我/我们自己的财务、会计、税务、法律和/或其他顾问。
12. 通过提交此表格，我/我们同意并授权 Metis SG 及/或其指定的代表及/或代理（以及其可能聘请的其他第三方服务提供商（此类代表、代理及/或授权服务提供商均称为“代表”），并且这些代表可能位于新加坡境外）收集、接收、使用、存储、披露和处理我/我们的个人数据（定义见条款和条件），并依据不时修订的 Metis SG 隐私政策（可在 https://metisgl.com.sg/media/1/docs/privacy_policy.pdf 获取）（“隐私政策”）的条款进行操作，隐私政策的条款通过引用并入条款和条件，并可根据我/我们的要求提供），用于以下一项或多项目的：
 - a. 处理此表格，并向我/我们提供您的产品和服务以及第三方服务提供商的服务；
 - b. 管理和/或维护我们与您之间的关系和/或我们的账户；
 - c. 隐私政策中列明的任何目的。

我/我们进一步声明并保证：

- a. 我/我们向您提供的所有信息（包括但不限于个人资料和联系信息）均准确完整；
- b. 如果与此表格相关，我/我们提供了任何第三方的个人数据，我/我们进一步保证并声明，这些第三方也已同意隐私政策的条款，并同意根据上述条款及此处规定的所有目的，收集、接收、使用、存储、披露和处理其个人数据；
- c. 我/我们是此申请或其他提供给 Metis SG 的文件中提供的电话号码和其他联系信息的用户和/或订户，并同意我/我们已阅读并理解上述条款。

我/我们确认，本申请表中的签名旨在确认本申请表中的所有声明和确认，以及我/我们对契约中所有条款和条件的接受，这些条款和条件对我/我们具有约束力。

Plan Number 计划号码

Part 4. Declaration and Authorisation (continued)
第四部份声明和授权(继续)

Signature 签名

Full Name of Main Applicant
(As in FIN/Passport including any alias and other names)
主要申请人全名
(与 FIN/护照上的姓名一致, 包括任何别名和其他姓名)

Date Signed (DD/MM/YYYY) 签署日期 (日/月/年)

Signature 签名

Full Name of Joint Applicant (where applicable)
(As in FIN/Passport including any alias and other names)
联名申请人全名 (如适用)
(与 FIN/护照上的姓名一致, 包括任何别名和其他姓名)

Date Signed (DD/MM/YYYY) 签署日期 (日/月/年)