

## Beneficiary Information Form 计划之第二阶层受益人个人资料表

**Plan Number 计划号码**

I hereby provide Metis Global (Singapore) Pte. Limited ("Metis SG") my personal data and information pertaining to Trust Plan Number.

我特此向安智环球服务（新加坡）（"Metis SG"）提供我的个人资料和有关信托计划的资料。

**Note 注意**

Please complete this form and send it to [service.metissg@metisgl.com](mailto: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](mailto:service.metissg@metisgl.com)。

Please fill in the details and sign next to any amendments. 请填写详细信息，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. Personal Particulars Details 第一部份 详细个人资料**

**1.1 Personal Particulars 个人资料**

Full Name 全名   
(As in IC/Passport including any alias and other names) 与身份证/护照一致，包括任何别名和其他名称)

Passport No./ Identity Card No.  Date of Birth 出生日期  Gender 性别

Country of Birth 出生国家  Nationality 国籍

**1.2 Contact Information 联系信息**

Mobile 手机号码  Home 家庭号码  Work 工作号码

Email Address 电子邮件地址

Residential Address 居住地址

Country 国家  Postal Code 邮政编码

Metis SG to accept: (a) the copy of the NRIC/FIN/Passport and proof of residential address ^, provided the beneficiary is able to produce the original identity and proof of residential address; or (b) a CTC of the NRIC/FIN/Passport and proof of residential address ^, provided that it is certified by a suitably qualified person (e.g. a notary public, a lawyer or certified public or professional accountant). Metis SG reserves the right to request for more information and/or documents before making a distribution. ^Examples of proof of residential address- 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.  
Metis SG 可接受: (a) 身份证/外国人身份证号码/护照的复印件及住址证明 ^, 前提是受益人能够出示原件及住址证明; 或 (b) 身份证/外国人身份证号码/护照的认证副本及住址证明 ^, 前提是该文件由适当资格人士 (如公证员、律师或注册会计师) 认证。Metis SG 保留在分配前要求更多资料和/或文件的权利。  
^住址证明的示例-水电费账单、银行对账单及法定或政府机构出具的信函 (日期为过去三个月内), 信函需清楚显示信头、姓名、地址和日期。

**Part 2. Payment Details 第二部份 付款详情**

Metis SG can make a distribution to your banking account and any bank administrative charges incurred will be set-off from the withdrawal amount and/or encashment value. Please provide the following details. Metis SG 可以将分配款项汇入您的银行账户，任何银行行政费用将从提款金额和/或兑现价值中扣除。请提供以下详细信息。

Bank Account Holder's Name 银行账户持有人姓名

Bank Account Number 银行账户号码

Name of Bank 银行名称

A copy of the bank book or bank statement stating account holder name and number must be submitted for a direct credit request unless the direct credit account was previously provided to and accepted by Metis SG. 除非直接存入的账户之前已提供给并被Metis SG接受，否则必须提交银行存折或银行对账单的复印件，内容需包括账户持有人姓名和号码。

**Part 3. Declaration of Tax Residency**  
**第三部份 料税务居民声明**

**Important Notes 重要说明**

Metis Global (Singapore) Pte. Limited ("Metis SG") is required to collect certain information about your tax residency in order to comply with the Singapore Income Tax Act (Chapter 134) and related regulations including Income Tax (International Tax Compliance Agreements) (United States of America) Regulations 2015 (FATCA) and Income Tax (International Tax Compliance Agreements) (Common Reporting Standard) Regulations 2016 (CRS). If you are tax resident outside the country/jurisdiction where your account is held, we may need to give the national tax authority this information, along with information relating to your accounts. That may then be shared between different country/jurisdictions' tax authorities.

Please note that providing false or misleading information is an offence under the Singapore Income Tax Act (Chapter 134)

安智环球（新加坡）（以下简称“Metis SG”）根据新加坡所得税法第134章及相关法规（包括《所得税（国际税务合规协定）（美国）法规2015年》（FATCA）和《所得税（国际税务合规协定）（共同申报标准）法规2016年》（CRS））的规定，需要收集有关您的税收居民地的特定信息，以确保合规。如果您是在您的账户所在的国家/司法管辖区以外的税收居民，我们可能需要向该国家/司法管辖区的税务机构提供这些信息，以及与您的账户相关的信息。这些信息可能会在不同国家/司法管辖区的税务机构之间共享。

请注意，根据新加坡所得税法第134章，提供虚假或误导性信息属于违法行为。

If you have any questions on how to define your tax residency status, please visit [www.oecd.org/tax/automatic-exchange/](http://www.oecd.org/tax/automatic-exchange/) or speak to a professional tax adviser as we are not allowed to give tax advice.

如果您对如何确定您的税收居民地状态有任何问题，请浏览[www.oecd.org/tax/automatic-exchange/](http://www.oecd.org/tax/automatic-exchange/) 或咨询专业的税务顾问，因为Metis不提供税务建议。

1. Are you a US Citizen, Green Card Holder or a person having US tax filing obligations?  Yes  No  
您是否是美国公民、绿卡持有人或有美国税务申报义务的人士？

2. I am currently a tax resident in the following list of countries/jurisdictions (provide details below).  
我目前是在下列出的国家/地区的税收居民（请在下方提供详细资料）。

No.	Country(ies) or jurisdiction(s) of tax residence* 税务管辖区*	Tax Identification Number (TIN) 税务编号(TIN)	If TIN is not available, please select the reason code. (refer to Table 1 below) 如没有提供税务编号，请选择理由为A、B或C (请参考下面的表格1)	If reason B is selected, please explain why you are unable to obtain a TIN 如选取理由 B，请解释账户持有人不能取得税务编号的原因。
1.	<input type="text"/>	<input type="text"/>	<input type="radio"/> A <input type="radio"/> B <input type="radio"/> C	<input type="text"/>
2.	<input type="text"/>	<input type="text"/>	<input type="radio"/> A <input type="radio"/> B <input type="radio"/> C	<input type="text"/>
3.	<input type="text"/>	<input type="text"/>	<input type="radio"/> A <input type="radio"/> B <input type="radio"/> C	<input type="text"/>

\* If you are a United States (U.S.) Citizen or U.S. resident for tax purposes, you are required to submit Form W-9.  
\*如果您是美国公民或美国税务居民，您需要提交W-9表格

**Table 1 表格1**

Reason Code 理由代码	Description 描述
A	The jurisdiction where you are resident for tax purposes does not issue TINs to its residents. 您所居住的税务居住地的司法管辖区不向其居民发放税务编号 (TIN)。
B	You are unable to obtain a TIN. (Please explain why you are unable to obtain a TIN if you have selected this reason) 您无法获得税务编号 (TIN)。（如果您选择了此原因，请解释为什么您无法获得税务编号）。
C	TIN is not required. (Only select this reason if the authorities of the jurisdiction of residence do not require the TIN to be disclosed). 无需TIN（只有在居住司法管辖区的当局不要求披露TIN时，才选择此原因）。

3. Is your residential address, mailing address or contact number different from your country(ies) of tax residence?  Yes  No  
您的居住地址、通讯地址或联络电话与您的税务居住国家/地区不同吗？

- Student at an education institution in the country of residence. 在居住国家/地区的教育机构就读学生。
- Working in the country of residence for less than 6 months. 在居住国家/地区工作不满6个月。
- On an educational or cultural exchange visitor program in the country of residence for less than 6 months. 在居住国家/地区进行教育或文化交流访问计划，不超过6个月。
- Regular travel between jurisdiction for work and home. 经常因工作需要不同国家/地区之间旅行。
- Others, please specify:

**Plan Number** 计划号码

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**Part 4. Declaration and Signature**

**第四部份 声明及签署**

1. I hereby authorise Metis SG to credit the distribution as per the payment details provided. Amounts so credited would constitute valid discharge of payments due to the beneficiaries under the Trust Plan.
2. By submitting this form, I 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 further represent and warrant that:

- a. all of the information provided by me to you (including without limitation personal particulars and contact information) is accurate and complete; and
  - b. if in connection with this form, I provide the personal data of any third parties, I 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 the user(s) and/or subscriber(s) of the telephone number and other contact details provided by me in this application or other documents furnished by/to Metis SG and agree that I have read and understood the above provisions.
3. 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).
  4. 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.
  5. 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 our name or the authenticity of the signature appearing thereon or the validity of the electronic instructions.
  6. I understand that sending electronic instructions is not a safe and reliable transmission method. Metis SG shall not, in any event, be liable to 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.
  7. 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.
  8. I declare that all statements made in this form are, to the best of my knowledge and belief, correct and complete. I acknowledge that the information I provided in this form will supersede any previous information which I have disclosed to Metis SG with respect to all accounts which I am a beneficiary.
  9. I have attached the following documents with this Request:
 

	Yes	NA
• Identification Docs	<input type="checkbox"/>	<input type="checkbox"/>
• Proof of Residential Address	<input type="checkbox"/>	<input type="checkbox"/>
• A copy of the bank book or bank statement	<input type="checkbox"/>	<input type="checkbox"/>

Plan Number 计划号码

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**Part 4. Declaration and Signature (continued)**  
**第四部份 声明及签署(继续)**

1. 我特此授权Metis SG 按照所提供的付款详情进行分配款项的存入。所存入的金额将构成对信托计划下受益人应付款项的有效偿还。
2. 通过提交此表格, 我同意并授权 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](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/或维护我与您之间的关系和/或我的账户;
  - c. 隐私政策中列明的任何目的。

我进一步声明并保证:

- a. 我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, 我提供了任何第三方的个人数据, 我进一步保证并声明, 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, 并同意我已阅读并理解上述条款。
3. 我同意并明确表示同意, Metis SG 有权向任何政府机构、监管机构和/或其他任何人提供我的个人数据和信息, 以履行其根据适用税法法规的义务, 包括新加坡所得税法 (第 134 章)、外国账户税收合规法 (“FATCA”) 以及经济合作与发展组织共同报告标准 (“CRS”) 有关财务账户信息的共同交换。我理解, 此类披露可能:
    - a. 涉及跨境传输个人数据和信息至辖区外;
    - b. 与本表格中提供的个人数据和信息有关, 或与我提供给 Metis SG 的任何其他文件或即将提供的文件有关; 并且;
    - c. 与账户持有人及任何相关信托计划的信息有关。
  4. 我承诺在影响我的税务居民身份或导致本表格信息不正确或不完整的情况下, 及时在30天内通知 Metis SG。如果出现此类情况的变化, 我将于该变化发生后90天内向 Metis SG 提交更新的 FATCA 和 CRS 自我认证表格。我理解, 关于我税务居民身份的任何虚假、误导或欺诈性信息可能会导致某些处罚。
  5. 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签署的真实指示。根据电子指示进行的任何交易对我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。
  6. 我理解, 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。
  7. 我同意赔偿Metis SG及其任命或雇用的任何人员因本表格中指定的请求而可能产生的所有索赔、责任、损害、损失、成本和任何类型的费用, 以及与之相关的所有诉讼或法律程序, 除非是由于Metis SG或其任命或雇用的其他人员的过失或故意违约所导致的。
  8. 我声明, 本表格中所作的所有陈述在我所知和所信的范围均为正确和完整。我承认我在本表格中提供的信息将取代我之前向 Metis SG披露的与我作为受益人的所有账户相关的任何信息。
  9. 我已随本请求附上以下文件:
 

	是	不适用
• 身份证明文件	<input type="checkbox"/>	<input type="checkbox"/>
• 住址证明	<input type="checkbox"/>	<input type="checkbox"/>
• 银行存折或银行对账单的复印件	<input type="checkbox"/>	<input type="checkbox"/>

Signature 签名

Full Name of Applicant

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

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)