

UPDATE OF PERSONAL PARTICULARS AND MARKETING CONSENT FORM
个人资料更新及营销同意申请表

Plan Number 计划号码

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

我希望向安智环球服务（新加坡）（“Metis SG”）提交以下请求，以对我的信托计划进行以下修改。

Note 注意

Please complete this form and send it to service.metisgg@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.metisgg@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. Change of Contact Details

第一部份 更改联系资料

Change of Residential Address (Please attached with the address proof) 更改居住地址(请附上地址证明)

New Address 新地址

Postal Code 邮政编码 Country 国家

Change of Correspondence Address 更改通讯地址

Only for Trust Plan Number stated above 仅适用于上述信托计划号码

New Address 新地址

Postal Code 邮政编码 Country 国家

Change of Contact Number 更改联系电话

New Mobile Number 新手机号码

New Home Number 新家庭电话号码

New Office Number 新办公室电话号码

Change of Email Address 更改电子邮件地址

New Email Address 新电子邮件地址

Note 注意

1. 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".
默认情况下，您所有现有计划将根据上述提供的详细信息进行更新。如果您希望 Metis SG 仅更新上述信托计划号码的通讯地址，请勾选“仅适用于上述信托计划编号”框。

2. 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.
如果您当前的居住/通讯地址与您之前提交的国家/地区不同，或者您的税务居民身份已发生变化，请与本申请一起提交“Metis SG CRS 自我认证表格 - 个人表格”。

3. Please complete separate forms for each settlor who wishes to change their contact details in any Joint Application Trust Plan.
请为希望在任何联名申请信托计划中更改联系信息的每位设立人填写单独的表格。

4. 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.
请附上经过适当资格认证人员（例如公证人、律师或注册会计师）认证的身份证明文件或账单证明的真实副本。账单证明的示例包括：公用事业账单、银行对账单以及由法定或政府机构出具的信件（日期在过去3个月内），信头、姓名、地址和日期均应清晰显示。

Part 2. Change of Personal Particulars

第二部份 更改计划持有人的个人资料

Change of Name 更改姓名

Given Name 名字

(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)

Surname 姓氏

(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)

Change of Nationality 更改国籍

Nationality 国籍

Plan Number 计划号码

Part 2. Change of Personal Particulars (continued)
第二部份 更改计划持有人的个人资料 (继续)

Change of Passport Details 护照详情更改

Passport Number 护照号码 Expiry Date 到期日期

Note 注意

- 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.
对于所有更改姓名的请求: 请提供您的身份证的经认证的真实副本 (由合格人员认证, 如公证人、律师或注册会计师/专业会计师), 显示您的新姓名及支持您更改姓名的法律文件。
- 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.
对于所有更改国籍的请求: 请提供您的身份证或护照的经认证的真实副本 (由合格人员认证, 如公证人、律师或注册会计师/专业会计师), 显示您的新国籍。请同时提交一份"Metis SG CRS 自我认证表格 - 个人表格"与此申请一并提交。
- For change of nationality request to US citizenship: If change to US citizenship, please complete IRS Form W-9.
对于更改为美国国籍的请求: 如果更改为美国国籍, 请填写 IRS W-9 表格。
- 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.
对于所有更改护照详情的请求: 请提供您的护照的经认证的真实副本 (由合格人员认证, 如公证人、律师或注册会计师/专业会计师), 显示您的新护照详情。

Part 3. Change of Signature
第三部份 更改签名

New Signature Specimen 新签名样本

Please sign below: 请在下面签名:

Part 4. Change of Business Partner Representative
第四部份 更换业务合作伙伴

I would like to change my Business Partner Representative. 我想更换我的业务合作伙伴。

Name of Business Partner Representative 业务合作伙伴的姓名

Mobile 手机号码 Business Partner Representative Code 业务合作伙伴号码

Part 5. Politically Exposed Person (PEP) Declaration
第五部份 政治敏感人物 (PEP) 声明

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.

政治公众人物 (PEP) 是指一位自然人, 曾经或者目前担任过显要的公众职能, 无论是在新加坡、外国还是国际组织。显要的公众职能包括国家元首、政府首脑、政府部长、高级公务员或公职人员、高级司法或军事官员、国有企业的高级管理人员、政党的高级官员、立法机构的成员, 以及国际组织的高级管理人员。

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.

如果您或任何受益人是政治公众人物 (PEP) 或政治公众人物的家庭成员*或密切关联者**, 您必须披露此信息。

* A "family member" means a parent, step-parent, child, step-child, adopted child, spouse, sibling, step-sibling and adopted sibling of the PEP.
"家庭成员"指的是政治公众人物 (PEP) 的父母、继父母、子女、继子女、收养子女、配偶、兄弟姐妹、继兄弟姐妹和收养兄弟姐妹。

** A "close associate" means a natural person who is closely connected to a PEP, either socially or professionally.
"密切联系人"指的是与政治公众人物 (PEP) 在社交或职业上有密切关系的自然人。

Name of PEP PEP 的全名

Title of PEP PEP 的头衔

Name of person related to PEP 与 PEP 相关的人员全名

Relationship to PEP 与 PEP 的关系

Plan Number 计划号码

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Part 6. Personal Data Use Statement
第六部份个人资料使用声明

Marketing Consent 营销同意书

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:

我在此同意 Metis SG (包括 Metis SG 的代表) 及其服务提供商通过以下方式与我联系 (即使我的电话号码已在国家拒接电话登记处注册或可能注册):

- Voice Call Mail/Email/Any other avenues of marketing activities SMS
 语音通话 邮件/电子邮件/其他任何营销活动渠道 短信

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.

出于营销目的, 并向我提供与 Metis SG 或其相关公司所推广的产品和服务相关的营销、广告和促销信息、材料和/或文件。

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.

我不希望收到有关 Metis SG 及其授权代表分发、推广和/或介绍的产品和服务的营销更新/信息。

Part 7. Others
第七部份 其他

Please specify any other personal information that you would like the change. 请详细说明您希望更改的个人资料事项。

Part 8. Declaration and Authorisation
第八部份 声明及授权

1. 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 ("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.

Plan Number 计划号码

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Part 8. Declaration and Authorisation (continued)

第八部份 声明和授权 (继续)

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 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.
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 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 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 approval of the request and Metis SG will notify me of the effective date of the change.
1. 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 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。

Plan Number 计划号码

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Part 8. Declaration and Authorisation (continued)
第八部份 声明和授权 (继续)

2. 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。
3. 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。
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。
5. 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。
6. 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。
7. 我理解, 更新仅在 Metis SG 接受并完成请求后生效, Metis SG 将通知我更改的生效日期。

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)