

Trust Plan Alternation Request Form 更改计划供款事项申请表

Plan Number 计划号码

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.

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. Change of Payment Method
第一部份 更改供款方式

I/We would like to change our Trust Plan payment method to: 我 / 我们欲自即日起更改我 / 我们的供款方式为:

- Bank Transfer (Quarterly / Semi Annually / Annual Contribution only) 银行转账 (仅限季度/半年/年度供款) Credit Card 信用卡

Note 注意

If you have selected "Credit card", please complete "Payment Application - Credit Card Authorisation Form" to set up your credit card.
如果您选择了“信用卡”, 请填写“付款申请 - 信用卡授权表”以设置您的信用卡。

Part 2. Change of Contribution Frequency
第二部份 更改供款频率

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:

我 / 我们欲申请更改计划供款频率, 未来的供款金额请根据新供款频率做等比例调整。选择新的供款频率为:

- Monthly 每月 Quarterly 每季 Semi-Annually 每半年 Annually 每年

Note 注意

a) 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.
如果将供款频率从较高频率 (例如: 月供) 更改为较低频率 (例如: 年供), 您可能需要支付到下一个供款到期日的按比例供款。

b) If your payment method is via Bank transfer and will like to change to monthly, please also change payment method to credit card.
如果您的付款方式是通过银行转账并希望更改为每月付款, 请同时将付款方式更改为信用卡。

b) If your payment method is via Bank transfer and will like to change to monthly, please also change payment method to credit card.
如果您的付款方式是通过银行转账并希望更改为每月付款, 请同时将付款方式更改为信用卡。

Part 3. Decrease/Cessation of Regular/Additional Regular Contribution
第三部份 定期/增加定期定额供款的减少/停止

I/We would like to decrease my/our Regular contribution to:
我 / 我们希望将我 / 我们的定期供款减少至:

I/We would like to decrease my/our Additional Regular contribution to:
我 / 我们希望将我 / 我们的增加定期定额供款减少至:

I/We would like to cease my/our Regular contribution. 我 / 我们希望停止我/我们的定期供款。

I/We would like to cease my/our Additional Regular contribution. 我 / 我们希望停止我/我们的定期定额供款。

Note 注意

1. 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.
Metis SG 不提供任何财务顾问服务。您在信托计划进行任何更改之前, 建议寻求您的财务顾问 (如有) 的建议。您的财务顾问应能够解释您决策的影响, 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提供适当的建议。

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.
定期供款和增加定期定额供款只能在相关的定期供款和增加定期定额供款的首次供款期结束后减少或停止。

3. For details on the minimum Contribution requirements, please refer the Terms and Conditions of the Trust Plan.
有关最低供款要求的详细信息, 请参阅信托计划的条款和条件。

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.
为避免疑虑, 即使在减少您的定期供款和/或增加定期定额供款后, 您的资产选择也将保持不变。

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Part 4. Prepayment of Contribution
第四部份 预缴供款

One-off Prepayment 一次性预缴数期供款

I/We would like to prepay the regular contribution for instalment(s). The total amount is and payment will be made via the payment method selected below.

我 / 我们欲依以下所选择付款方式预缴 期之定期供款，付款币别为 ，总金额 。

Bank Transfer 银行转账 Credit Card 信用卡

Note 注意

- If the selected payment method differs from the original payment method selected, your application for prepayment of contribution will also change the payment method for future regular contributions. If the Plan currency is different from the contribution currency, the new contribution amount will be calculated based on the contribution amount and exchange rate as determined by Metis SG. To change your payment frequency, please fill in Section 2 "Change of Payment Frequency". Please arrange prepayments according to your application after receiving Metis SG' approval.
申请预缴供款需事先经 Metis SG 预审与提交本表格。如上列指定的付款方式与原选择的不同，则视为同时申请变更未来的定期付款方式；若供款币别不同，则新供款金额将根据供款金额和由 Metis SG 决定的汇率进行计算。欲更改供款频率，请填写项目 B) "更改供款频率"。请于收到 Metis SG 通知审核通过后，再依申请内容安排预缴供款。
- You can only apply to make a prepayment of up to 10 years of contribution. That is, the period cannot exceed 10 years from the month of receiving prepayment until the "next contribution due date" after the prepayment is complete.
累计预缴供款不得超过十年期，从预缴当月起算至"下次供款到期日"，不得超过十年。
- Metis SG will allocate the prepayment in accordance with the current asset allocation or portfolio.
Metis在收到预缴供款后，只会依本计划目前之资产配置指示或所选择的资产组合进行分配。
- Please be reminded that if the Plan is terminated or a partial withdrawal has been made on the initial units before the Plan maturity date, the Plan will be subject to Exit Charge even if all the contributions have been prepaid. The applicable Exit Charge Rate will be dependent on either, (i) the number of years from the date of Termination or Partial Withdrawal until the end of your chosen Contribution Payment Term ("CPT"); or (ii) the number of years from the date of last Contribution until the end of your chosen CPT, as determined by Metis SG. Each incomplete year remaining in the CPT will be rounded up to a complete year. There will be no Exit Charge after CPT.
仅提醒您，如果计划在到期日前要求终止或自首账户提取部分款项时，将会产生提前退出费，即使所有供款已预先支付。适用的退出费率根据以下两种情况之一确定：(i) 从计划部分提款或终止日起算，至您的原供款年期到期日止；或 (ii) 根据最后一次供款逾期日至原供款年期到期日止。由Metis择一决定CPT的剩余供款年期，剩余供款年期不足一年者以一年计算。计划供款年期届满后则无退出费。

Part 5. Application for a Contribution Holiday
第五部份 申请供款假期 / 停供

I/We would like to apply for a Contribution Holiday for my/our Plan: (tick one from below four options)
我 / 我们欲申请供款假期 / 停供 (请从以下四个选项中选择一项):

- Implement the Contribution Holiday with immediate effect and automatically resume contribution collection after the end of the Contribution Holiday.
请 24 个月供款假期，并于结束后自动恢复供款。
- Implement the Contribution Holiday with immediate effect and do not resume contribution collection until further notice. 自即日起生效，直至另行通知重新开始供款为止。
- Implement the Contribution Holiday with immediate effect and will resume contribution collection in (mm) (yyyy)
自即日起生效，并于 月 年重新开始供款。
- Others, please specify:
其他，请说明：

Note 注意

- You are not allowed to apply for a Contribution Holiday or Paid-up if there is any outstanding contribution in Initial Contribution Period. Contribution Holiday or Paid-up will only commence after all outstanding contributions in the Initial Contribution Period have been made.
若首初供款期内有欠款，则阁下所申请的供款假期或停供将无法受理。申请的供款假期或停供仅会在首初供款期内所有欠款已付清后才开始。
- Each Contribution Holiday will last for a maximum of 24 months. The Plan will become Paid-up automatically if Metis SG does not receive contribution for 24 consecutive months, and a 0.02% per month of Paid-up charge on the Initial Account Value will be levied on the Plan. The Paid-up status will be maintained until the Plan is terminated or reinstated.
供款假期最长为24个月，如Metis SG 于连续24个月未能收到阁下之应付供款，则计划将被自动转为停供状态，且于停供期内将收取每月首初账户价值0.02%的停供期行政费，直至计划到期、全部兑现、终止或重新供款为止。
- The Plan Maturity Date will remain unchanged even if you have applied for a Contribution Holiday or the Plan is Paid-up.
即使计划曾经申请供款假期或计划进入停供期，计划到期日仍维持不变。
- All the relevant Plan charges will continue to be charged during a Contribution Holiday / Paid-up status.
即使计划在供款假期 / 停供期，所有相关的计划收费仍会持续收取。
- If the value of the Plan is insufficient to cover the Plan charges, the Plan will be terminated without value and all benefits will be ceased.
如计划价值不足以支应计划收费，则计划将被终止且无价值，而所有权益也将中止。
- For Plans with a Contribution Payment Term of at least 10 years, if there is any outstanding contribution during the first 10 years of the Contribution Payment Term, the Plan will not be entitled to receive the Plan Fee Refund at maturity. In future, clients can consider making up the arrears during the relevant period in order to be entitled for the Plan Fee Refund.
定期定额供款计划如供款年期等于或为10年期以上之计划，在计划首10年，若有任何欠款，则于计划到期时将无法享有计划费用回赠的奖励。故阁下日后可考虑补缴有关期间的欠款，以获取奖励。

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Part 6. Reinstatement / Repayment Arrangement
第六部份 复效 / 欠款安排

I/We would like to apply to reinstate my/our Plan: (Apart from choosing Part 3 to select payment method, please also choose Part 1 and/or 2 to repay the relevant outstanding payments within the ICP and after the ICP):
我 / 我们择以下欠款安排与付款方式, 申请计划复效:

(除勾选以下 3) 的付款方式外, 请视欲补缴首初期内或/及之后的款项, 勾选 1) 或/及 2) 的选项):

1) Repayment arrangement for outstanding contributions within the Initial Contribution Period ("ICP"):

1) 「首初供款期」内的欠款安排:

- Repay all outstanding contributions within the ICP and resume future contribution payment.
补缴首初供款期内的所有欠款, 并恢复未来供款。
- Repay all outstanding contributions within the ICP and apply for a Contribution Holiday of 24 months and automatically resume contribution collection after the end of the Contribution Holiday.
补缴首初供款期内的所有欠款, 并申请 24 个月供款假期, 且于到期后自动恢复供款。
- Repay all outstanding contributions within the ICP and apply for a Contribution Holiday of 24 months. Do not resume contribution collection until further notice.
补缴首初供款期内的所有欠款, 并申请供款假期 / 停供, 暂不恢复定期供款, 直至另行通知为止。

2) Repayment arrangement for outstanding contributions after the ICP:

2) 「首初供款期」之后的欠款安排:

Resume Regular Contributions Immediately, and 立即恢复定期供款, 且:

- Do not repay any outstanding contribution. 不补缴任何欠款。
- Repay all outstanding contribution from the Contribution Holiday or paid-up. 补缴全部供款假期或停供期间的欠款。
- Repay the latest instalments of contribution, totaling (currency and amount).
补缴最近 期供款, 共计 (币别和金额)。
- Others, please specify:
其他, 请说明:

3) Payment Method for Repayment of Outstanding Contribution:

3) 选择补缴欠款的付款方式:

- Bank Transfer 银行转账 Credit Card 信用卡
- Others, please specify:
其他, 请说明:

Note 注意

1. Please be reminded that the Plan cannot be reinstated once it has been terminated.
若计划已被终止, 则无法申请复效。
2. The Plan can only be reinstated after the outstanding contributions within the ICP have been repaid.
计划仅于缴清所有首初期欠款后方可复效。
3. The payment currency needs to be identical with the Plan contribution currency during ICP. If the ICP of your Plan has been cleared, the Plan contribution currency and amount will be converted to match with the currency stated in the repayment method.
在首初供款期内的供款币别必须与计划供款币别相同。如计划首初供款期已结束, 则计划的供款币别及金额将根据阁下选择补缴欠款的付款方式所适用之币别自动转为相对应的币别及金额。
4. If you would like to resume regular contribution but change to another payment method, please fill in Part 1 "Change of Payment Method".
如欲恢复定期供款, 但选择的供款方式与先前不同, 请填写第一部份 - 更改供款方式。
5. If you would like to repay contributions for any particular period of the Contribution Payment Term, please specify in Part 5 above; otherwise, the repayment will be settled from the latest instalment upfront.
如欲补缴特定期限的供款, 请于上列第五部份 - 其他说明, 否则将自最近一期起算往前补缴欠款。
6. If you wish to repay contributions during Paid-up status, please be reminded that the Paid-up charges (0.02% per month of Initial Account Value, if applicable) are not refundable even if all outstanding contributions have been repaid.
敬提醒, 如欲补缴停供期间的欠款, 已收取的停供期行政费 (每月首初账户价值的0.02%, 如适用) 将不予退还。
7. Metis SG will allocate the contributions received in accordance with the current asset allocation.
Metis SG 在收到补缴欠款后, 将依本计划目前之资产配置指示或所选择的资产组合进行分配。

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Part 7. Change of Plan Valuation Currency
第部七份 更改计划估值币别

I/We would like to change my/our Plan Valuation Currency to:
我 / 我们确认欲更改我 / 我们的计划估值货币为:

USD 美元 HKD 港元 SGD 新元

Part 8. Other Service Request
第部八份 其他服务指示

Part 9. Declaration and Authorisation
第九部份 声明和授权

1. 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.

2. 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.

3. We 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.

4. I/We 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.

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Part 9. Declaration and Authorisation (continued)
第九部份 声明和授权 (继续)

1. 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。
2. 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。
 3. 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。
 4. 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 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)