

Supporting Documents required under Specified Events

Specified Events	Supporting Documents
<p>Death of Settlor</p>	<p>Death Certificate</p> <p>For deaths that occurred in Singapore, please submit a copy of the digital Death Certificate issued by the Immigration & Checkpoints Authority. For overseas deaths (Singaporeans or Permanent Residents), please certify the Death Certificate at the Singapore Embassy or with a Notary Public of the country of death.</p> <p>For overseas deaths (Foreigners), please certify the Death Certificate with a Notary Public of the country of death.</p> <p>Where the Death Certificate is in a language other than English, it must be translated into English by a certified translator.</p>
<p>Activation of Contingent Investment Adviser (Death of Settlor)</p>	<p>Death Certificate</p> <p>For deaths that occurred in Singapore, please submit a copy of the digital Death Certificate issued by the Immigration & Checkpoints Authority. For overseas deaths (Singaporeans or Permanent Residents), please certify the Death Certificate at the Singapore Embassy or with a Notary Public of the country of death.</p> <p>For overseas deaths (Foreigners), please certify the Death Certificate with a Notary Public of the country of death.</p> <p>Where the Death Certificate is in a language other than English, it must be translated into English by a certified translator.</p>
<p>Activation of Contingent Investment Adviser (Incapacity of Settlor)</p>	<p>Medical report certifying that the settlor does not have the ability to give reasoned consideration to financial or business matters</p> <p>a) Requirements for medical reports issued in Singapore:</p> <ol style="list-style-type: none"> i) The medical report must be issued by a certified medical practitioner registered with the Singapore Medical Council. ii) Metis SG to accept: <ul style="list-style-type: none"> • a copy of the medical report, provided that a Metis SG staff has sighted the original document; or • a certified true copy of the medical report, provided that it is certified by a suitably qualified person (e.g. a notary public, a lawyer or certified public or professional accountant) iii) If handwritten, the medical report must be legible. iv) The settlor’s medical report must clearly state: <ul style="list-style-type: none"> • Doctor’s opinion on the settlor’s mental capacity - medical reports that only provide medical jargon may be rejected. • Whether the settlor’s mental incapacity is or is not permanent. <p>b) Requirements for medical reports issued outside of Singapore:</p> <ol style="list-style-type: none"> i) Where the medical report is in a language other than English, it must be translated into English by a certified translator. ii) Metis SG to accept: <ul style="list-style-type: none"> • a copy of the medical report (or certified translation), provided that a Metis SG staff has sighted the original document; or • a certified true copy of the medical report (or certified translation), provided that it is certified by a suitably qualified person (e.g. a notary public, a lawyer or certified public or professional accountant) iii) If handwritten, the medical report must be legible. iv) The settlor’s medical report must clearly state: <ul style="list-style-type: none"> • Doctor’s opinion on the settlor’s mental capacity - medical reports that only provide medical jargon may be rejected. • Whether the settlor’s mental incapacity is or is not permanent.

Supporting Documents required under Specified Events

Specified Events	Supporting Documents
No appointment of CIA	You may appoint a CIA either at the point of application for Metis' trust plans or after the trust plan has come into force. In the event that there is no CIA, Metis SG will have the power to appoint any person that it thinks fit to be the CIA.
Distribution to beneficiaries (Above 21years old)*	Metis SG to accept: <ol style="list-style-type: none"> a) a copy of the beneficiary's NRIC/FIN/Passport and proof of residential address^, provided the beneficiary is able to produce the original identification document and proof of residential address; or b) a certified true copy of the beneficiary's 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)
Distribution to beneficiaries (Below 21years old)*	<ol style="list-style-type: none"> 1. Metis SG will make the distribution to the minor's legal guardian. 2. The guardian must be physically present at Metis SG's registered office to request for the distribution, and present the following documents: <ol style="list-style-type: none"> a) Where the guardian is a parent of the minor beneficiary: <ul style="list-style-type: none"> • a copy of the minor's birth certificate, the guardian's and the minor's NRIC/FIN/ Passport and proof of residential address^, provided they are able to produce the original documents; or • a certified true copy of the minor's birth certificate, the guardian's and the minor's NRIC/FIN/ Passport and proof of residential address^, provided that they are certified by a suitably qualified person (e.g. a notary public, a lawyer or certified public or professional accountant) b) Where the guardian is not a parent of the minor beneficiary: <ul style="list-style-type: none"> • a copy of the Will / Court Order appointing the guardian as a legal guardian of the minor, the guardian's and minor's NRIC/FIN/Passport and proof of residential address^, provided they are able to produce the original documents; or • a certified true copy of the Will / Court Order appointing the guardian as a legal guardian of the minor, the guardian's and minor's NRIC/FIN/Passport and proof of residential address^, provided that they are certified by a suitably qualified person (e.g. a notary public, a lawyer or certified public or professional accountant)
Settlor(s) / Beneficiaries uncontactable	Metis SG will take all reasonable endeavors to locate the settlor and beneficiaries. <ol style="list-style-type: none"> a) In the event that the settlor cannot be located for a period of 6 months, he/she will be deemed to be Incapacitated under the terms of the trust plan. b) In the event that the beneficiaries cannot be located and the monies remain unclaimed for 6 years, Metis SG will pay the monies into court pursuant to the Trust Companies Act

^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 CRS Self Certification Form is required for distribution to beneficiaries