

Beneficiary Information Form

Plan Number

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

Note:

Please complete this form and send it to service.sg@metisgl.com.

Personal Particulars

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

NRIC/FIN/Passport No. Date of Birth / /

Nationality Country of Birth Gender

Mobile Home Work

Email Address

Residential Address

Postal Code Country

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.

Payment Details

By default, any amount payable will be made to the Beneficiary's PayNow account using his/her NRIC/FIN. Please ensure that the Beneficiary has signed up for PayNow with his/her bank and that the account has been linked to his/her NRIC/FIN. Payments via PayNow are only available in SGD.

Log in to your bank's internet or mobile banking account > Sign up for PayNow > Link your PayNow to your NRIC/FIN.

Alternate Payment Instructions

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 tick the box below and provide the following details.

Direct Credit to the selected Banking account

Bank Account Holder's Name(s)

Bank Account Number

Name of Bank

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.

Tax Residency Declaration

Important Notes

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)

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

- Are you a US Citizen, Green Card Holder or a person having US tax filing obligations? Yes No
- Are you a tax resident of Singapore?
 - Yes, I am solely a tax resident of Singapore and do not have a foreign tax residency. My Singapore TIN in my NRIC or FIN.
if your TIN is not your NRIC or FIN, please state it here:
 - No, I am currently a tax resident in the following list of countries/jurisdictions (including Singapore, if applicable and provide details below)

No.	Country(ies) or jurisdiction(s) of tax residence*	Tax Identification Number (TIN)	If TIN is not available, please Select the reason code (refer to Table 1 below)			If reason B is selected, please explain why you are unable to obtain a TIN
1.	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	<input type="radio"/> A	<input type="radio"/> B	<input type="radio"/> C	<input style="width: 100%;" type="text"/>
2.	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	<input type="radio"/> A	<input type="radio"/> B	<input type="radio"/> C	<input style="width: 100%;" type="text"/>
3.	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	<input type="radio"/> A	<input type="radio"/> B	<input type="radio"/> C	<input style="width: 100%;" type="text"/>

*if you are a United States (U.S.) Citizen U.S resident for tax purposes, you are required to submit Form W-9.

Reason Code	Description
A	The jurisdiction where you are resident for tax purposes does not issue TINs to its residents.
B	You are unable to obtain a TIN. (Please explain why you are unable to obtain a TIN if you have selected this reason)
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)

- Is your residential address, mailing address or contact number different from your country(ies) of tax residence? Yes No
If yes, please select one of the following:
 - Student at an education institution in the country of residence.
 - Working in the country of residence for less than 6 months.
 - On an educational or cultural exchange visitor program in the country of residence for less than 6 months.
 - Regular travel between jurisdiction for work and home.
 - Others, please specify:

Declaration and Signature

- 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.
- I will not hold Metis SG liable and shall 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 these communications unless due to the negligence or wilful default of Metis SG or any other person appointed or employed by it.
- Metis SG may rely conclusively upon and accept any communications received via email or Metis SG's online portal (collectively "**electronic communications**") which is in good faith believed to be genuinely endorsed/signed by me/us. Any transactions made according to electronic communications shall be irrevocable and binding upon me, whether such electronic communications 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) initiating the electronic communications in my name or the authenticity of the signature appearing thereon or the validity of the electronic communications.
- I understand that sending electronic communications 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.

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5. 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 with your products and services as well as the services of third-party service providers;
 - b) administering and/or managing our relationship and/or my 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 and/or subscriber of the telephone number and other contact details provided by me in this application or other documents furnished by/to Metis and agree that I have read and understood the above provisions.

6. 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"/> |

7. 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 account holder(s) and any information about relevant Trust Plan(s).
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 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.

Full Name of Beneficiary
(As in NRIC/FIN/Passport including any alias and other names)

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Signature

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Date Signed

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