

Contingent Investment Adviser (CIA) 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

Declaration and Signature

- I understand that I have been appointed as a Contingent Investment Adviser of the Trust Plan in which this form relates to and I hereby agree to take up the appointment. I understand that the Contingent Investment Adviser will be vested with all investment powers upon the death or Incapacity of the Settlor (or in the case of joint application) both Settlers and is required to exercise such powers in accordance with the Terms and Conditions of 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.
- 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:
 - processing this form and providing me with your products and services as well as the services of third-party service providers;
 - administering and/or managing our relationship and/or my account(s) with you; and/or
 - any of the purposes set out in the Privacy Policy.

I further represent and warrant that:

- all of the information provided by me to you (including without limitation personal particulars and contact information) is accurate and complete; and

