

### Notification of Incapacitation of Settlor

Plan Number

I would like to submit the following notification to Metis Global (Singapore) Pte. Limited ("Metis SG") pertaining to Trust Plan Number:

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**Note:**  
Please complete this notification and send it to [service.sg@metisgl.com](mailto:service.sg@metisgl.com).

#### Section A - Details of Settlor

|   |                      |                        |                      |   |                      |   |                      |                      |                      |                      |
|---|----------------------|------------------------|----------------------|---|----------------------|---|----------------------|----------------------|----------------------|----------------------|
| Full Name<br><small>(As in NRIC/FIN/Passport including any alias and other names)</small> | <input type="text"/> | Date of Incapacitation | <input type="text"/> | / | <input type="text"/> | / | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| NRIC/FIN/Passport No.   | <input type="text"/> |                        |                      |   |                      |   |                      |                      |                      |                      |

#### Section B - Declaration and Authorisation

- 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/us, whether such electronic communications have in fact been given with or without my/our 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/our 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.
- I understand that the notification will be take effect only after Metis SG's validation.
- 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](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/us with your products and services as well as the services of third-party service providers;
  - administering and/or managing our relationship and/or our 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
- 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
- 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                      | No                       |
| Medical Reports* | <input type="checkbox"/> | <input type="checkbox"/> |

\*Please refer to the guidelines on page 3.

7. I understand that Metis SG reserves the right to request for more information and/or documents.



**Plan Number**

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**Full Name**  
(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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### Supporting Document Guidelines

| Specified Events   | Supporting Documents   |
|--|--|
| <b>Activation of Contingent Investment Adviser (Incapacity of settlor)</b> | <b>Medical report certifying that the settlor does not have the ability to give reasoned consideration to financial or business matters</b>  |
|  | <p>a) Requirements for medical reports issued in Singapore:</p> <ul style="list-style-type: none"> <li>i) The medical report must be issued by a certified medical practitioner registered with the Singapore Medical Council.</li> <li>ii) Metis SG to accept:             <ul style="list-style-type: none"> <li>• a copy of the medical report, provided that a Metis SG staff has sighted the original document; or</li> <li>• 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)</li> </ul> </li> <li>iii) If handwritten, the medical report must be legible.</li> <li>iv) The settlor’s medical report must clearly state:             <ul style="list-style-type: none"> <li>• Doctor’s opinion on the settlor’s mental capacity - medical reports that only provide medical jargon may be rejected.</li> <li>• Whether the settlor’s mental incapacity is or is not permanent.</li> </ul> </li> </ul>  |
|  | <p>b) Requirements for medical reports issued outside of Singapore:</p> <ul style="list-style-type: none"> <li>i) Where the medical report is in a language other than English, it must be translated into English by a certified translator.</li> <li>ii) Metis SG to accept:             <ul style="list-style-type: none"> <li>• a copy of the medical report (or certified translation), provided that a Metis SG staff has sighted the original document; or</li> <li>• 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)</li> </ul> </li> <li>iii) If handwritten, the medical report must be legible.</li> <li>iv) The settlor’s medical report must clearly state:             <ul style="list-style-type: none"> <li>• Doctor’s opinion on the settlor’s mental capacity - medical reports that only provide medical jargon may be rejected.</li> <li>• Whether the settlor’s mental incapacity is or is not permanent.</li> </ul> </li> </ul> |