



# FACT SHEET SUPPLEMENTARY FORM

## Definitions and Requirements Relating to “Selected Client” & “Trusted Individual”

1. “Selected Client” is defined as any Client who meets any two of the following criteria:
  - (i) 62 years of age or older;
  - (ii) Not proficient in spoken or written English; or
  - (iii) Has below GCE ‘O’ level or ‘N’ level certifications, or equivalent academic qualifications.
2. Selected Client should be accompanied by a Trusted Individual (TI) when purchasing a DPI.
3. If the Selected Client is not accompanied by a TI, the client can still choose to purchase a DPI and the Life Insurer needs to remind the client:
  - (i) that the DPI is bought without financial advice;
  - (ii) that there is a 14-day free-look period; and
  - (iii) to check with a TI on the DPI bought within the free-look period.

### I acknowledge that:

- (a) I have been briefed on the above 3 items by the Life Insurer and understood all of them.
- (b) I will check with a Trusted Individual on the DPI I have just bought within the next 14 days.
- (c) I consent to Singapore Life Ltd. (“Singlife”) collecting, using and/or disclosing my personal data (whether contained in this form or from other sources; existing data in Singlife’s record or to be collected in future) for the purpose of issuing the relevant policy to me including but not limited to underwriting, processing and/or administering the policy; and for statistical, research, compliance, audit, regulatory and such other purposes as may reasonably be required.

I also consent to Singlife disclosing and transferring my personal data to Singlife related group of companies, service providers, reinsurers, suppliers and/or intermediaries (including my financial adviser, where applicable), whether located in Singapore or elsewhere, for the above purposes.

I have read, understood and agree to be bound by the terms of Singlife’s Data Protection Notice (which may be found on <https://singlife.com/en/pdpa>) as may be amended, supplemented and/or substituted by Singlife from time to time, and confirm that I am aware that the latest version of such terms (amended, supplemented and/or substituted version) will be posted on Singlife’s website and such version shall bind me upon posting and/or where I continue to use the relevant products and services offered by Singlife to which such terms relate to.

Name	<input type="text"/>
NRIC/ID	<input type="text"/>
Date	<input type="text"/>
Signature	<input type="text"/>

4. "Trusted Individual" (TI) is defined as:

- (i) At least aged 18;
- (ii) Possess at least GCE 'O' or 'N' level certifications or equivalent academic qualifications;
- (iii) Be proficient in spoken or written English; and
- (iv) Be a person who has the trust of the Selected Client.

**I acknowledge that:**

- I am familiar with Investment or Life Insurance Products.
- I have fulfilled the above definition and I am a Trusted Individual to (Client's name)

- I am privy to the personal information of the Selected client (as identified above) and have assisted the Selected Client to better understand his/her financial decision.

I consent to Singapore Life Ltd. ("Singlife") collecting, using and/or disclosing my personal data (whether contained in this form or from other sources; existing data in Singlife's record or to be collected in future) for the purpose of issuing the relevant policy to the Selected Client (as identified in this form) including but not limited to underwriting, processing and/or administering the policy; and for statistical, research, compliance, audit, regulatory and such other purposes as may reasonably be required.

I also consent to Singlife disclosing and transferring my personal data to Singlife related group of companies, service providers, reinsurers, suppliers and intermediaries (including the Selected Client's financial adviser, where applicable), whether located in Singapore or elsewhere, for the above purposes.

I have read, understood and agree to be bound by the terms of Singlife's Data Protection Notice (which may be found on <https://singlife.com/en/pdpa>) as may be amended, supplemented and/or substituted by Singlife from time to time, and confirm that I am aware that the latest version of such terms (amended, supplemented and/or substituted version) will be posted on Singlife's website and such version shall bind me upon posting and/or where the Selected Client continues to use the relevant products and services offered by Singlife to which such terms relate to.

Name	<div></div>
NRIC/ID	<div></div>
Date	<div></div>
Signature	<div></div>