

FORM 2 REVOCATION OF TRUST NOMINATION



Guide on submitting Nomination Form

We encourage our policy owners to refer to “Your Guide to the Nomination of Insurance Nominees 2015” which is available on www.singlife.com or www.lia.org.sg before making a nomination.

A. Eligibility

- Policy owner and Life assured must be the same person who is at least 18 years old.
- Nominations are applicable for Life or Accident & Health (A&H) policy(ies) with death benefits.
- Annuity purchased with the minimum sum is not permitted.
- If Policy is subjected to any trust created under Section 73 of the Conveyancing and Law of Property Act 1886, trust has to be revoked with trustee(s)' and beneficiary(ies)' consent before making a new nomination.
- **Applicable to Form 1 only:**
 - » Nominees for **Irrevocable Nomination (Form 1)** must be spouse and/or child.
 - » Policy must not be a Central Provident Fund (CPF), Supplementary Retirement Scheme (SRS) and Dependant Protection Scheme (DPS)

B. Completing the form

- Amendments / initialing against an amendment is not allowed.
- One set of original form submission per policy.
- **Applicable to Form 1 and 4:**
 - » Total Share of all Nominees must add up to 100%.
- Form should be signed and witnessed on the same date.
- Signature of policyowner must be consistent with our records. Please update your signature if you do not have any specimen signature maintained with us

C. Documents required

- **Applicable to Form 1 and 3:**

Trustee(s) should complete and submit:

 - » Common Reporting Standard (CRS) form.
 - » W8BEN or W9 form (W8BEN-E form if trustee is an entity)
 - » Copy of trustee(s) identity card(s) / passport (ACRA if trustee is an entity)
 - » Copy of Trustee(s)' proof of residential address
 - For Singaporean/PR: copy of identity card
 - For Passholders: recent utility bills or letters issued by a statutory or government body (dated within past 6 months).

For full list of acceptable documents, please refer to www.singlife.com.
- **Applicable to Form 1 only:**
 - » Original form is required for Trust Nomination to be registered.
 - » Copy of beneficiary(ies) identity card(s) / passport.

Please submit the completed and signed original form to:

Singapore Life Ltd., 4 Shenton Way #01-01 SGX Centre 2 Singapore 068807

For enquiries, please contact us at 6827 9933 or email cs_life@singlife.com

INSURANCE ACT**INSURANCE (NOMINATION OF BENEFICIARIES) REGULATIONS 2009****FORM 2****REVOCATION OF TRUST NOMINATION****PLEASE READ THE FOLLOWING BEFORE COMPLETING THIS FORM**

- 1) This Form can only be used to revoke a trust nomination made in respect of one relevant policy.
- 2) Unless the context otherwise requires, this Form must be completed in full in order for the revocation of a trust nomination to be valid.
- 3) The revocation of a trust nomination must comply with section 132(7) of the Insurance Act 1966, and must be carried out using this Form, in order for the revocation to be valid.
- 4) The revocation of a trust nomination, if valid, will take effect from the date this Form is lodged with the registered insurer that issued the relevant policy specified in Part 1.
- 5) The revocation of a trust nomination, if valid, will apply to the entire trust nomination.
- 6) The policy owner and either of the following must sign this Form in the presence of 2 witnesses, in order for the revocation of the trust nomination to be valid:
 - (a) any trustee of the policy moneys payable under the relevant policy specified in Part 1 (not being the policy owner); or
 - (b) each nominee who has attained the age of 18 years and a parent or legal guardian (not being the policy owner) of each nominee who is below the age of 18 years.
- 7) This Form must be lodged with the registered insurer that issued the relevant policy specified in Part 1. Otherwise, the registered insurer will not be bound to give effect to the purported revocation of the trust nomination by this Form.

PART 1: INSTRUCTIONS

In accordance with section 132(7) of the Insurance Act 1966, I revoke the trust nomination which I had made on in respect of the relevant policy specified below.

Policy No. or other reference of the relevant policy

Where the policy number or other reference is NOT available, please provide:

(a) the plan name; and

(b) the Basic Sum Assured

Name of Insurer: Singapore Life Ltd.

Name of Policy Owner

NRIC/Passport Number of Policy Owner

Signature or right thumb print of Policy Owner

Date (DD/MM/YYYY)

PART 2: CONSENT OF TRUSTEE, OR OF NOMINEE(S) AND PARENT(S) OR LEGAL GUARDIAN(S) OF NOMINEE(S)

Notes:

In this Part, "licensed trust company", "director" and "resident manager" have the same meanings as in the Trust Companies Act 2005.

In accordance with section 132(7) of the Insurance Act 1966, I/we expressly consent/ the named licensed trust company expressly consents* to the revocation of the trust nomination made on in respect of the relevant policy specified in Part 1.

TRUSTEE 1

Name and NRIC or Passport No. of trustee (if trustee is an individual), or of parent or legal guardian of nominee below age of 18 years; or Name and Unique Entity No. of trustee (if trustee is a licensed trust company)

Name and NRIC, Birth Certificate or Passport No. of nominee (not applicable if this Part is completed by a trustee)

Date (if there is more than one signatory, all signatories must sign on the same date)

Signature or right thumb print of trustee (if trustee is an individual), nominee who has attained age of 18 years, or parent or legal guardian of nominee below age of 18 years; or Signature, name and designation of authorised director or resident manager of trustee (if trustee is a licensed trust company)

PART 2: CONSENT OF TRUSTEE, OR OF NOMINEE(S) AND PARENT(S) OR LEGAL GUARDIAN(S) OF NOMINEE(S)

TRUSTEE 2

Name and NRIC or Passport No. of trustee (if trustee is an individual), or of parent or legal guardian of nominee below age of 18 years; or Name and Unique Entity No. of trustee (if trustee is a licensed trust company)

Name and NRIC, Birth Certificate or Passport No. of nominee (not applicable if this Part is completed by a trustee)

Date (if there is more than one signatory, all signatories must sign on the same date)

Signature or right thumb print of trustee (if trustee is an individual), nominee who has attained age of 18 years, or parent or legal guardian of nominee below age of 18 years; or Signature, name and designation of authorised director or resident manager of trustee (if trustee is a licensed trust company)

TRUSTEE 3

Name and NRIC or Passport No. of trustee (if trustee is an individual), or of parent or legal guardian of nominee below age of 18 years; or Name and Unique Entity No. of trustee (if trustee is a licensed trust company)

Name and NRIC, Birth Certificate or Passport No. of nominee (not applicable if this Part is completed by a trustee)

Date (if there is more than one signatory, all signatories must sign on the same date)

Signature or right thumb print of trustee (if trustee is an individual), nominee who has attained age of 18 years, or parent or legal guardian of nominee below age of 18 years; or Signature, name and designation of authorised director or resident manager of trustee (if trustee is a licensed trust company)

TRUSTEE 4

Name and NRIC or Passport No. of trustee (if trustee is an individual), or of parent or legal guardian of nominee below age of 18 years; or Name and Unique Entity No. of trustee (if trustee is a licensed trust company)

Name and NRIC, Birth Certificate or Passport No. of nominee (not applicable if this Part is completed by a trustee)

Date (if there is more than one signatory, all signatories must sign on the same date)

Signature or right thumb print of trustee (if trustee is an individual), nominee who has attained age of 18 years, or parent or legal guardian of nominee below age of 18 years; or Signature, name and designation of authorised director or resident manager of trustee (if trustee is a licensed trust company)

PART 3: WITNESSES

Notes:

1. Each witness must have attained the age of 21 years.
2. A witness must not be a nominee or the spouse of a nominee.
3. The date specified in this Part and the date specified in Part 1 must be the same date.

WITNESS 1

Name of Witness

NRIC or Passport No. of Witness

Telephone No.of Witness

Address of Witness

Signature of Witness

I confirm that Parts 1 and 2 of this Form were signed in my presence.

Date (DD/MM/YYYY)

WITNESS 2

Name of Witness

NRIC or Passport No. of Witness

Telephone No.of Witness

Address of Witness

Signature of Witness

I confirm that Parts 1 and 2 of this Form were signed in my presence.

Date (DD/MM/YYYY)