

IMPORTANT THINGS TO NOTE

WHEN COMPLETING THE FORM

A. When Completing the Form

To ensure that your form will be accepted and processed promptly, please note the following when completing the form:

1. If your policy is insured under "The Great Eastern Life Assurance Co. Ltd", please use the form with Name of Insurer printed as such. If your policy is insured under "The Overseas Assurance Corporation Limited", please use the form with Name of Insurer printed as such.
2. No amendments or corrections can be made on the form.
3. Applicable to Form 1, Form 2, Form 3, Form 4 and Form 5. Please ensure that the date of witnessing by the two witnesses is the same as the date under Part 1 Instructions. The witnessing is valid only when the witness sights the signing of the form by the policyholder.
4. Applicable to Form 1 and Form 4. Please ensure that Total (%) field under the Share of nominee (%) column is filled in and all share percentages add up to 100%. Please keep the percentage to two decimal places maximum.
5. Please send the completed form to:

The Great Eastern Life Assurance Company Limited
1 Pickering Street #01-01
Great Eastern Centre
Singapore 048659

B. Documents required when you make a Trust Nomination or appoint a Trustee

Applicable to Form 1 and Form 3. Please ensure that additional documents below are submitted with the nomination form:

- 1) Copy of NRIC/passport of each trustee, and
- 2) Pursuant to the U.S. Foreign Account Tax Compliance Act ("FATCA"), the Company is required to provide information of trustees who are U.S. Persons (i.e. having a U.S. Tax Residency). FATCA does not apply to A&H policies and non-cash value policies.
Therefore please provide
 - i) Declaration Form for New Customers to be completed by each trustee, if the trustee is an individual
 - ii) W8BEN-E Form or W9 Form to be completed by each trustee, if the trustee is a company
- 3) Pursuant to the Singapore Income Tax Act and regulations thereunder, which implement the standard for automatic exchange of financial account information in tax matters (commonly known as the "Common Reporting Standard" or "CRS"), the Company is legally obliged to obtain a self-certification from the holder, trustee and/or nominee of a policy to which the CRS applies, in order to determine the tax residence(s) of such person. CRS does not apply to A&H policies and non-cash value policies.
Therefore please provide
 - i) the individual Self-Certification Form to be completed by the Policyholder; and
 - ii) the Individual Self-Certification Form to be completed by each nominee if you are making a Trust Nomination. If the nominee is below 18 years old, the policyholder or the legal guardian can complete the form on behalf; and
 - iii) the Individual Self-Certification Form to be completed by each trustee if the trustee is an individual; or
 - iv) the Entity Self-Certification Form if the trustee is a company. For Controlling Persons of the trustee who is a passive Non-Financial Entity ("NFE"), or an Investment Entity located in a Non-Participating Jurisdiction and managed by another Financial Institution, please also complete the Controlling Persons Self-Certification Form.

Note: A Distribution Representative/Personal Financial Planner cannot be appointed as Trustee of the policy unless proof of relationship (spouse/ child/ parent) is provided.

C. If your policy is to be used for Exemption from Home Protection Scheme

Policy used for Exemption from Home Protection Scheme (HPS)

A nomination should not be made for a policy which you have used or would like to use for exemption from Home Protection Scheme as it may result in you having to purchase insurance under HPS from CPF Board or get another appropriate life insurance policy to apply for exemption from HPS.

If you need any clarification or assistance, you may contact our Customer Service Officers on 1800-248 2888 or email us at wecare-sg@greateasternlife.com.

Thank you for your continued support.

1 Pickering Street #01-01
Great Eastern Centre
Singapore 048659
Tel +65 6248 2000
Fax +65 6532 2214
greateasternlife.com

INSURANCE ACT

**INSURANCE (NOMINATION OF BENEFICIARIES)
REGULATIONS 2009**

FORM 3

APPOINTMENT, OR REVOCATION OF APPOINTMENT, OF TRUSTEE OF POLICY MONEYS

PLEASE READ THE FOLLOWING BEFORE COMPLETING THIS FORM

- 1 This Form can only be used to appoint, or to revoke the appointment, of one or more trustees of policy moneys payable under one relevant policy.
- 2 Unless the context otherwise requires, Parts 1, 2 and 3 must be completed in full in order to appoint a trustee of policy moneys payable under a relevant policy.
- 3 Unless the context otherwise requires, Parts 1, 2 and 4 must be completed in full in order to revoke the appointment of a trustee of policy moneys payable under a relevant policy.
- 4 Unless the context otherwise requires, Parts 1, 2, 3 and 4 must be completed in full in order to revoke the appointment of a trustee of policy moneys payable under a relevant policy, and to appoint a new trustee for those policy moneys.
- 5 An appointment of a trustee of policy moneys payable under a relevant policy must comply with section 49L(12) and (14) of the Insurance Act (Cap. 142), and must be made using this Form, in order for it to be valid.
- 6 The revocation of the appointment of a trustee of policy moneys payable under a relevant policy must comply with section 49L(12) of the Insurance Act, and must be carried out using this Form, in order for the revocation to be valid.
- 7 The appointment, or the revocation of the appointment, of a trustee pursuant to this Form, 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.
- 8 The policy owner must sign this Form in the presence of 2 witnesses.
- 9 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 appointment, or the purported revocation of the appointment, of any trustee of policy moneys pursuant to this Form.

Part 1 INSTRUCTIONS

In accordance with section 49L(12) of the Insurance Act, I hereby —

- (a) appoint each person specified in Part 3 as a trustee of the relevant policy specified below./; and*
- (b) revoke the appointment(s) of the trustee(s) specified in Part 4.*

* Please delete as appropriate.

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 Insured.	
Name of insurer	THE OVERSEAS ASSURANCE CORPORATION LTD.
Name of policy owner	
NRIC or Passport No. of policy owner	
Signature or right thumb print of policy owner	
Date	



Part 2 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.

Name of witness	(1)	(2)
NRIC or Passport No. of witness		
Address of witness		
Telephone No. of witness		
Signature of witness	I confirm that this Form was signed by the policy owner in my presence.	I confirm that this Form was signed by the policy owner in my presence.
Date		

Part 3 APPOINTMENT OF TRUSTEE(S)

Notes:

- 1 A trustee who is an individual must have attained the age of 18 years.
- 2 A trustee appointed under this Part will be in addition to any trustee appointed earlier whose appointment has not been revoked.
- 3 The policy owner may be named as trustee. However, if the policy owner is named as a trustee:
 - (a) he will not be able to consent to the revocation of the trust nomination;
 - (b) he will not be able to consent to the variation of a term or condition of the relevant policy, or to the execution by the registered insurer that issued the relevant policy of any instruction in relation to the relevant policy which may directly or indirectly alter the benefits payable under the relevant policy; and
 - (c) he will not be able to give a valid discharge to the registered insurer that issued the relevant policy for any payment made, pursuant to the trust nomination, from the policy moneys payable under the relevant policy.
- 4 In this Part, "licensed trust company", "director" and "resident manager" have the same meanings as in the Trust Companies Act (Cap. 336).

Name of trustee	(1)	(2)
NRIC or Passport No. of trustee (if trustee is an individual) or Unique Entity No. of trustee (if trustee is a licensed trust company)		
Date of birth of trustee (if trustee is an individual) or date of incorporation of trustee (if trustee is a licensed trust company)		
Address of trustee		
Telephone No. of trustee		
Signature or right thumb print of trustee (if trustee is an individual) or signature, name and designation of authorised director or resident manager of trustee (if trustee is a licensed trust company)	I agree/The abovenamed licensed trust company agrees* to be appointed as a trustee of the policy moneys payable under the relevant policy specified in Part 1.	I agree/The abovenamed licensed trust company agrees* to be appointed as a trustee of the policy moneys payable under the relevant policy specified in Part 1.

* Please delete as appropriate.



Part 4 REVOCATION OF APPOINTMENT OF TRUSTEE(S)

Notes:

- 1 A policy owner may revoke the appointment of a trustee if, after the revocation of that trustee's appointment, there is at least one remaining trustee.
- 2 The revocation of the appointment of a trustee under this Part does not affect the appointment of any other trustee.
- 3 In this Part, "licensed trust company" has the same meaning as in the Trust Companies Act (Cap. 336).

Name of trustee	(1)	(2)
NRIC or Passport No. of trustee (if trustee is an individual) or Unique Entity No. of trustee (if trustee is a licensed trust company)		

