

## IMPORTANT THINGS TO NOTE ON NOMINATION FORMS

### 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. No amendments or corrections can be made on the form. Amendment with countersigning or amendment using correction tape is not allowed.
2. Applicable to Form 1, Form 2, Form 3, Form 4 and Form 5. Please ensure that the date of witnessing by the two appropriate signatories is the same as the date specified by the policy owner, trustee(s) and nominee(s).
3. Applicable to Form 1 and Form 4. Please ensure that the "Total shares of all nominees (%)" field is filled in and the total shares of the nominees listed add up to 100%. The shares of the nominee(s) must be reflected as a percentage (up to a maximum of 2 decimal places).
4. 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 the following additional documents, where applicable, are submitted with the nomination form:

1. Copy of NRIC/passport of each trustee (if trustee is an individual);
2. Copy of Business Profile from Accounting & Corporate Regulatory Authority (ACRA) or its equivalent dated within the last three (3) months of each trustee (if trustee is a licensed trust company);
3. Pursuant to the U.S. Foreign Account Tax Compliance Act ("FATCA"), the Company is required to obtain information from the trustee of a policy to assess if such a trustee is a U.S. Tax Resident, as such, please provide:
  - i) FATCA Declaration Form to be completed by each trustee;
  - ii) W-8BEN-E Form to be completed by each trustee (if trustee is a licensed trust company and not having a U.S. Tax Residency);
  - iii) W-9 Form to be completed by each trustee (if trustee is having a U.S. Tax Residency);
4. Pursuant to the Singapore Income Tax Act 1961 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, as such, please provide:
  - i) CRS Individual Self-Certification Form to be completed by each nominee. For a nominee who is below 18 years old, the policyholder or the legal guardian can complete the form on behalf;
  - ii) CRS Individual Self-Certification Form to be completed by each trustee (if trustee is an individual);
  - iii) CRS Entity Self-Certification Form to be completed by each trustee (if trustee is a licensed trust company). For Controlling Person 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 CRS Controlling Person Self-Certification Form.

**\*FATCA and CRS do not apply to A&H policies and non-cash value policies**

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

### C. If your policy is to be used for Exemption from Home Protection Scheme ("HPS")

Trust Nomination should not be made for a policy which you have used or would like to use to apply for an exemption from the Home Protection Scheme as it may result in you having to purchase insurance under HPS from the Central Provident Fund Board or apply for another life insurance policy to enjoy the 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@greatasteasternlife.com](mailto:wecare-sg@greatasteasternlife.com).

Thank you for your continued support.

**INSURANCE ACT 1966**  
**INSURANCE (NOMINATION OF BENEFICIARIES) REGULATIONS 2009**  
**FORM 1**  
**TRUST NOMINATION**

**PLEASE READ THE FOLLOWING BEFORE COMPLETING THIS FORM**

- 1 This Form can only be used to make a trust nomination in respect of one relevant policy.
- 2 Unless the context otherwise requires, this Form must be completed in full in order to make a valid trust nomination. The hard copy form of this Form must also be used.
- 3 A trust nomination must comply with section 132(2) and (3) of the Insurance Act 1966 ("Insurance Act"), and must be made using this Form, in order for it to be valid.
- 4 A trust nomination, if valid, will take effect from the date this Form is lodged with the licensed insurer that issued the relevant policy specified in Part 1A.
- 5 Only a policy owner who has attained the age of 18 years may make a trust nomination.
- 6 A person must agree to be appointed as a trustee before the policy owner makes the trust nomination, and the person may only agree so after being informed by the policy owner of the following matters in Parts 1A and 1B:
  - (a) the details of the relevant policy (Policy No. or other reference, and name of insurer);
  - (b) the person or persons whom the policy owner intends to nominate; and
  - (c) the share of the policy moneys that each of the persons mentioned in sub-paragraph (b) will receive.
- 7 If the policy owner wishes to amend Part 1A or 1B after obtaining a person's agreement to be appointed as a trustee, the policy owner must inform the person of the amendments to Parts 1A and 1B and obtain the person's agreement again.
- 8 The policy owner must sign this Form in person in the presence of 2 witnesses (who must make the declarations in Part 3), in order to make a valid trust nomination.
- 9 If this Form pertains to a relevant policy in respect of which a trust nomination has been made, this Form must be accompanied by a copy of Form 2 which revokes the earlier trust nomination. If Form 2 is completed in electronic form, the policy owner may provide the licensed insurer a printed copy of Form 2 or the reference number (if any) of the completed Form 2.
- 10 This Form must be lodged with the licensed insurer that issued the relevant policy specified in Part 1A. Otherwise, the licensed insurer will not be bound to give effect to the trust nomination purportedly made using this Form.

**Part 1A: POLICY OWNER'S INSTRUCTIONS**

In accordance with section 132(2) of the Insurance Act, I nominate each person named in Part 1B (called in this Form a nominee) to receive the share (of the policy moneys payable under the relevant policy specified below) set down against his or her name.

I understand that this nomination will not be revoked by my marriage or divorce. I also understand that this nomination will create a trust of the policy moneys in favour of every nominee named in Part 1B. I am aware that thereafter I will no longer have any interest in, or any right or control over, all or any of the policy moneys payable under the policy specified below (whether paid out during my lifetime or after my death). I will also not be allowed to vary any term or condition of the policy, or give any instruction in relation to the policy which may directly or indirectly alter the benefits payable under the policy, except in accordance with section 132(9) of the Insurance Act.

<p><b>Policy No. or other reference of the relevant policy</b></p> <p>Where the policy number or other reference is NOT available, please provide:</p> <p>(a) the plan name; and</p> <p>(b) the Basic Sum Insured.</p>	<p>(a)</p> <p>(b)</p>
<p><b>Name of insurer</b></p>	<p>THE GREAT EASTERN LIFE ASSURANCE COMPANY LIMITED</p>
<p><b>Name of policy owner</b></p>	
<p><b>NRIC or Passport No. of policy owner</b></p>	
<p><b>Signature or right thumb print* of policy owner</b></p>	<p style="color: red; text-align: center;">Wet-inked signature is required.</p>
<p><b>Email Address of policy owner</b></p>	
<p><b>Date (dd/mm/yyyy)</b></p> <p style="color: red;">(This date has to be the same as both appropriate signatories' date)</p>	

\* Please delete as appropriate.

**Part 1B: NOMINEE(S)**
Notes:

- 1 Only the spouse, or a child, of the policy owner is eligible to become a nominee under a trust nomination. The policy owner cannot name himself or herself as a nominee. A trust nomination will not be valid if any person other than the spouse or a child of the policy owner is named as a nominee.
- 2 A trust nomination will not be valid if any nominee's share is not specified.
- 3 The shares of the nominee(s) must be reflected as a percentage (up to 2 decimal places).
- 4 A trust nomination will not be valid if the total of the shares of all nominees does not add up to 100%.
- 5 A policy owner who wishes to name more than 4 nominees must attach to this Form as many additional copies of Form 1 as may be necessary to cover all nominees.

	(1)	(2)	(3)	(4)
<b>Name of nominee</b>				
<b>NRIC, Birth Certificate or Passport No. of nominee</b>				
<b>Date of birth of nominee (dd/mm/yyyy)</b>				
<b>Address of nominee</b>				
<b>Telephone No. of nominee</b>				
<b>Email Address of nominee</b>				
<b>Relationship of nominee to policy owner</b>				
<b>Share of nominee (%)</b>				
<b>Total shares of all nominees (%)</b>				

Note:

- 1 If there is no additional Form 1 attached to this Form, the total shares of the nominees listed in this Form must add up to 100%.
- 2 If there is any additional Form 1 attached to this Form, the sum of the total shares of all nominees listed in all Forms must add up to 100%.

Is there any additional copy of Form 1 attached to this Form?	Yes/No*
If the answer to the preceding question is "Yes", please state the number of additional copies of Form 1 attached to this Form.	

\* Please delete as appropriate.

**Part 2: TRUSTEE(S)**
Notes:

- 1 A trustee who is an individual must have attained the age of 18 years.
- 2 A policy owner must appoint at least one trustee. However, a policy owner may appoint more than one trustee. If a policy owner wishes to appoint more than 2 trustees, he or she may do so by completing Form 3.
- 3 The policy owner, a witness or a nominee may be named as trustee. However, if the policy owner is named as a trustee —
  - (a) he or she will not be able to consent to the revocation of the trust nomination;
  - (b) he or she will not be able to consent to the variation of a term or condition of the relevant policy, or to the execution by the licensed 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 or she will not be able to give a valid discharge to the licensed 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 meanings given by section 2 of the Trust Companies Act 2005.

	(1) (mandatory)	(2) (optional)
<b>Name of trustee</b>		
<b>NRIC or Passport No. of trustee (if trustee is an individual) or Unique Entity No. of trustee (if trustee is a licensed trust company)</b>		
<b>Date of birth of trustee (if trustee is an individual) or date of incorporation of trustee (if trustee is a licensed trust company) (dd/mm/yyyy)</b>		
<b>Address of trustee</b>		
<b>Telephone No. of trustee</b>		
<b>Email Address of trustee</b>		
<b>Signature or right thumb print* of trustee (if trustee is an individual) or signature or right thumb print*, name and designation of authorised director or resident manager of trustee (if trustee is a licensed trust company)</b>	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 1A.  <b>Wet-inked signature is required.</b>	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 1A.  <b>Wet-inked signature is required.</b>
<b>Date (dd/mm/yyyy)</b> <b>(This date has to be the same as both appropriate signatories' date)</b>		

\* Please delete as appropriate.

**Part 3: DECLARATIONS BY APPROPRIATE SIGNATORIES**

Notes:

- 1 Each appropriate signatory must have attained the age of 21 years.
- 2 An appropriate signatory must not be a nominee or the spouse of a nominee. Otherwise, the trust nomination made using this Form will not be valid.
- 3 The date specified in this Part and Part 1A must be the same date.

Declaration:

By signing below, I confirm that to the best of my knowledge and belief —

- a. the policy owner completed and signed this Form;
- b. the policy owner understands the purpose of this Form and the effect of his or her completion and signing of this Form; and
- c. no fraud or undue pressure has been used to induce the policy owner to make the nomination as set out in Parts 1A and 1B of this Form.

<b>Name of appropriate signatory</b>	(1)	(2)
<b>NRIC or Passport No. of appropriate signatory</b>		
<b>Address of appropriate signatory</b>		
<b>Telephone No. of appropriate signatory</b>		
<b>Email Address of appropriate signatory</b>		
<b>Signature or right thumb print* of appropriate signatory</b>	I confirm that this Form was signed by the policy owner in person in my presence.  <b>Wet-inked signature is required.</b>	I confirm that this Form was signed by the policy owner in person in my presence.  <b>Wet-inked signature is required.</b>
<b>Date (dd/mm/yyyy)</b> <b>(This date has to be the same as policy owner's date on Page 2)</b>		

\* Please delete as appropriate.