

**ERGO SINGAPORE  
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.\*

I agree and consent, and if I am submitting information relating to another individual, I represent and warrant that I have the authority to provide that information to ERGO, I have informed the individual about the purposes for which his/her personal information is collected, used and disclosed as well as the parties to whom such personal information may be disclosed by ERGO, as set out in the contents of the consent clause contained below and the individual agrees and consents, that ERGO may collect, use and process my/his/her personal information (whether obtained in this application form or otherwise obtained) and disclose such information to the following, whether in or outside of Singapore: (i) ERGO's group companies; (ii) ERGO's (or ERGO's group companies') service providers, reinsurers, agents, distributors, business partners; (iii) brokers, my/his/her authorised agents or representatives, legal process participants and their advisors, other financial institutions; (iv) governmental/regulatory authorities, industry associations, courts, other alternative dispute resolution forums, for the purposes stated in ERGO's Data Privacy Policy which include:

- a. Processing, underwriting, administering and managing my/his/her relationship with ERGO;
- b. Audit, compliance, investigation and inspection purposes and handling regulatory / governmental enquiries;
- c. Compliance with legal or regulatory obligations, risk management procedures and ERGO internal policies;
- d. Managing ERGO's infrastructure and business operations; and
- e. Carrying out market research and analysis and satisfaction surveys.

Note: Please refer to (and if submitting information relating to another individual, refer such individual to) the full version of ERGO's Data Privacy Policy found at <http://www.ergo.com.sg/pdpa>; before you provide your consent, and/or the above representation and warranty.

\* Please delete as appropriate.

|   |                                 |
|---|---------------------------------|
| <b>Policy No. or other reference of the relevant policy.</b> Where the policy number or other reference is NOT available, please provide:<br>(a) the plan name; and<br>(b) the Basic Sum Insured. |                                 |
| <b>Name of Insurer</b>  | <b>ERGO Insurance Pte. Ltd.</b> |
| <b>Name of Policy owner</b>   |                                 |
| <b>NRIC/FIN/Passport No. of Policy owner</b>  |                                 |
| <b>Signature or right thumb print of Policy owner</b>   |                                 |
| <b>Date</b>   |                                 |

## 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.

|   |   |   |
|---|---|---|
| <b>Name of Witness</b>                  | (1)   | (2)   |
| <b>NRIC/FIN/Passport No. of Witness</b> |   |   |
| <b>Address of Witness</b>               |   |   |
| <b>Telephone No. of Witness</b>         | _____ (Home)  | _____ (Home)  |
|   | _____ (Office)  | _____ (Office)  |
|   | _____ (Mobile)  | _____ (Mobile)  |
| <b>Signature of Witness</b>             |   |   |
|   | 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. |
| <b>Date</b>                             |   |   |

## 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).

|  |   |   |
|--|---|---|
| <b>Name of Trustee</b>   | MR / MS*  | MR / MS*  |
| <b>NRIC/FIN/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)</b>   |   |   |
| <b>Address of Trustee</b>  |   |   |
| <b>Telephone No. of Trustee</b>  | _____ (Home)  | _____ (Home)  |
|  | _____ (Office)  | _____ (Office)  |
|  | _____ (Mobile)  | _____ (Mobile)  |
| <b>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)</b> |   |   |
|  | I agree/The above named 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 above named 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 meanings as in the Trust Companies Act (Cap. 336).

| <b>Name of Trustee</b>   | <b>MR / MS*</b> | <b>MR / MS*</b> |
|--|-----------------|-----------------|
| <b>NRIC/FIN/Passport No. of Trustee (if trustee is an individual) or Unique Entity No. of trustee (if trustee is a licensed trust company)</b> |                 |                 |

\* Please delete as appropriate

**ERGO Insurance Pte. Ltd.**

Co. Reg. No.: 199305211H

5 Temasek Boulevard #04-05 Suntec Tower Five Singapore 038985

Tel: +65 6829 9199 Fax: +65 6829 9248 [www.ergo.com.sg](http://www.ergo.com.sg)

Enquiry on Nomination Matters: Monday to Friday: 8.30am – 5.30pm