

Alteration form for annuity policy

Important Notes:

For Singaporeans/PRs, submit a CLEAR copy of your NRIC (front & back).

For foreigners, submit a CLEAR copy of an identification (front & back) (e.g. employment pass, passport) and a CLEAR copy of documentary proof of the address, such as copies of utility bills, bank statements or letters issued by statutory or government bodies (dated within past 6 months) with letterhead, name, address and date clearly shown.

Details of policyholder

Name (as shown in NRIC)	NRIC number or FIN	Policy number
Name of company or school		
Exact nature of work	Occupation	

Type of request

Request	Details
Change of payout frequency <small>Please see notes 1 to 2 below</small>	Please choose your preferred payout frequency. <input type="checkbox"/> Monthly <input type="checkbox"/> Quarterly <input type="checkbox"/> Half Yearly <input type="checkbox"/> Yearly
Receiving annuity payouts via bank crediting through Giro <small>Please see notes 3 to 5 below</small>	Please provide a copy of your bank passbook/statement for verification. The bank account must be opened in Singapore.
Other request	

Note:

- 1 You must complete a full policy year's cycle of receiving payouts first before we process the change.
- 2 Policies under CPF RSS (previously known as CPF MSS) will only be on monthly payout frequency.
- 3 You must be the recipient of the annuity payouts.
- 4 If we are in the midst of processing your payout, your request will only be processed after this payout is completed.
- 5 For policies bought under the CPFIS (CPF OA or CPF SA) or SRS, we will only be able to process your request after we are notified that your Investment Account has been closed successfully, or your policy could be removed from CPFIS or SRS.

Mandatory declaration

1 Address verification

If your home address stated in our existing record is different from the address in your identity document (e.g. NRIC), please select Box A, B or C and complete the blanks accordingly. To check your address, please log on to me@income (available at www.income.com.sg).

<p>Box A <input type="checkbox"/></p> <p>I am maintaining a different address for correspondence purposes. The reason why I require a different address for correspondence is because _____ (specify reason). The owner of the correspondence address is _____ (specify name). My relationship with this owner is that of a _____ (specify relationship to owner of the correspondence address).</p>
<p>Box B <input type="checkbox"/></p> <p>The address in my identity document is not updated yet. The address with you is the updated one.</p>
<p>Box C <input type="checkbox"/></p> <p>I am a foreigner residing or working in Singapore and my home address is not in my identity document.</p>

If you have selected Box B or C, please give documentary proof of the home address stated as per our existing record, such as copies of utility bills, bank statements or letters issued by statutory or government bodies (dated within past 6 months) with letterhead, name, address and date clearly shown.

Declaration and authorisation

I understand and agree that the changes will take effect only when you accept and approve my request and notify me of the effective date of the changes.

Signature of policyholder	Signed in Singapore on
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