

## Change of cash benefit/coupon option form

### Details of policyholder/assignee/trustee

Policy number	Plan	Cash benefit/coupon due date
Name (as shown in NRIC)		NRIC number or FIN
Email		Contact number

Please note that the information provided in this section will not be updated in our records. To update your personal particulars, please submit the Change of personal particulars form.

### Cash benefit/coupon option

For change of cash benefit/coupon option after your policy is issued, please complete and submit this form.  
Please tick (✓) only ONE option.

- Mail me via cheque (this option is not applicable for plans with monthly payout)
- Credit into my **personal** bank account (Please submit a copy of your bank book or statement for account verification. You need to circle the account for crediting if your statement shows more than 1 bank account)
- Deposit with Income to earn an interest  
We may change the interest rate at any time by giving you 30 days' notice.

Buy units into a special investment-linked policy (this option is only available for RevoSave)  
Please select a **maximum of two funds and indicate the allocation**. Percentages must add up to 100%.  
Abridged Fact Find form for Investment-Linked Policy is to be completed and submitted together with this request.

<input type="checkbox"/> Aim 2025 _____ %	<input type="checkbox"/> Conservative Fund _____ %	<input type="checkbox"/> Money Market Fund _____ %
<input type="checkbox"/> Aim 2035 _____ %	<input type="checkbox"/> Global Bond Fund _____ %	<input type="checkbox"/> Prime Fund _____ %
<input type="checkbox"/> Aim 2045 _____ %	<input type="checkbox"/> Global Equity Fund _____ %	<input type="checkbox"/> Singapore Bond Fund _____ %
<input type="checkbox"/> Asia Managed Fund _____ %	<input type="checkbox"/> Global Technology Fund _____ %	<input type="checkbox"/> Singapore Equity Fund _____ %
<input type="checkbox"/> Balanced Fund _____ %	<input type="checkbox"/> Growth Fund _____ %	<input type="checkbox"/> Singapore Managed Fund _____ %
		<input type="checkbox"/> Takaful Fund _____ %
<input type="checkbox"/> Aim Now _____ %		

**Aim Now fund distribution option<sup>^</sup>**

Reinvestment       Encashment - Direct Credit (a copy of your bank book/statement is needed for verification)

**^Terms:**

- If no selection is indicated, the default option will be reinvestment.
- If you have selected Encashment - Direct Credit and you do not provide us with the bank account details or it is invalid, we will send the distribution by cheque to you.
- Any distributions below \$50 (or such other sums as may be determined by Income) will be reinvested and encashment is not allowed.
- The option selected will supercede your previous option (if any).

### Personal data use statement

The information I have provided is my personal data and, where it is not, I have the consent of the owner of the personal data to provide such information. The personal data includes personal data provided in this form or any document to Income, whether by me or any other party or source for this application or transaction.

By providing this information, I or we give my or our consent to Income, its respective representatives and agents (including Income's third party service providers located within and outside of Singapore) to collect, use, store, transfer and disclose the information for the purposes of processing and administering this insurance application or transaction, providing me with personalized products and services, information, and advice, and managing my relationship and policies with Income and for the purposes set out in Income's Privacy Policy which can be found at <http://www.income.com.sg/privacy-policy> ("How we use your personal data (Purpose & Notification Obligation)").

#### Important Notes:

You can request access to any personal data of yours that we have, and request to know how it is being used and disclosed for the last 12 months to the extent your right is allowed by law. If we allow you access, we may charge you a reasonable fee. You also have the right to request correction of your personal data.

You may make your request to access or correct your personal data by writing to:

The Data Protection Officer, Income Centre, 75 Bras Basah Road, Singapore 189557. Alternatively, you can email to: [DPO@income.com.sg](mailto:DPO@income.com.sg)

For any request to withdraw your consent, please contact Income Centre at 6788 1777 or [consentwithdrawal@income.com.sg](mailto:consentwithdrawal@income.com.sg).

**Policyholder's/assignee's acknowledgment**

- 1 I confirm that I understand that Income will follow this option I have selected for the later cash benefits/coupons, unless I give another written instruction at least 21 days before the next cash benefit/coupon is due. Otherwise, Income will only apply my selected option to the subsequent cash benefits/coupons.
- 2 I confirm that I am not an undischarged bankrupt and no bankruptcy application (including any statutory order) or order has no made against me.
- 3 I confirm that I understand and agree to the "Personal data use statement".

Signature

Date (dd/mm/yyyy)