

## Alteration form for annuity policy

**Important notes:**

1 We need the following identification documents to be submitted with this form.

For Singaporean or Singapore permanent resident

- Clear image of NRIC (front and back)

For foreigner staying, studying or working in Singapore

- Clear image of passport showing validity dates, passport number, photograph, nationality, date of birth and name;
- Singapore employment pass, S pass, work permit, student pass or dependent's pass (front and back); and
- Clear image of a document (issued within the last 6 months e.g. utility bill, phone bill) that shows your name and address.

The passport, passes or permits must be valid for at least 6 months.

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

Box A

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).

Box B

The address in my identity document is not updated yet. The address with you is the updated one.

If you have selected Box B, please give documentary proof of the address 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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