

Client Referral Services Consent Form

Name of Adviser	
Adviser's Code	
Branch	
Name of Client / Company	
Company Registration / Identification Number	
Contact Details – Email	
Contact Details – Handphone no.	
Contact Details – Office no.	

_____ (herein referred to as “I/We”) wish to be contacted for the following referral services by the respective referral partners, as indicated below:

General notes: This form has a list of selected partners which PIAS has an agreement with for each of the referral services. **For the avoidance of doubt, advisers are strictly disallowed to refer clients to any other companies not found in the form.**

Wills and Trusts Services

Will Writing		
Notes to advisers: You are strictly not allowed to write the will on behalf of your clients.		
<input type="checkbox"/> FortisWills Pte Ltd	<input type="checkbox"/> Precepts Legacy Pte Ltd (Formerly known as Rockwills)	<input type="checkbox"/> Wills and Legacy Pte Ltd
<input type="checkbox"/> SimplyWills Pte Ltd		
Trust Set Up and Administration		
<input type="checkbox"/> FortisWills Pte Ltd	<input type="checkbox"/> Precepts Legacy Pte Ltd	<input type="checkbox"/> Wills and Legacy Pte Ltd
Will Custody		
<input type="checkbox"/> FortisWills Pte Ltd	<input type="checkbox"/> Precepts Legacy Pte Ltd	<input type="checkbox"/> SimplyWills Pte Ltd
Lasting Power of Attorney		
<input type="checkbox"/> FortisWills Pte Ltd	<input type="checkbox"/> Precepts Legacy Pte Ltd	
Executor Appointment/Will Translation/ Estate Administration/Corporate Services		
<input type="checkbox"/> Precepts Legacy Pte Ltd		

Rockwills Corporation Pte Ltd has been rebranded as Precepts Legacy Pte Ltd with effect from 28 January 2020.

All referrals for Wills and Trusts Services under the Enhanced Introducer scheme are to be directed to PreceptsGroup International Pte Ltd. For Non-Enhanced Introducers, referrals can be made directly to Will and Legacy Pte Ltd below which is a Senior Franchisee of PreceptsGroup International Pte Ltd.

Residential Property Loans

Property Address (if available/where applicable) <small>*Please see Notes under 'For Official Use'</small>	
Loan amount (if available)	\$

Local Residential Property Loans		
<input type="checkbox"/> Standard Chartered Bank (Singapore) Limited (SCB)	<input type="checkbox"/> Malayan Banking Berhad (Maybank)	<input type="checkbox"/> Oversea-Chinese Banking Corporation Limited (OCBC)
<input type="checkbox"/> DBS Bank Ltd (DBS)	<input type="checkbox"/> RHB Bank Berhad (RHB)	<input type="checkbox"/> United Overseas Bank (UOB)
<input type="checkbox"/> HSBC Bank (Singapore) Limited (HSBC)		

Overseas Residential Property Loans					
Bank / Country	Malaysia	Australia	Japan	United Kingdom	United States
Oversea-Chinese Banking Corporation Limited (OCBC)			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
United Overseas Bank (UOB)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Other Loans

Local Renovation Loans	
<input type="checkbox"/> RHB Bank Berhad (RHB)	<input type="checkbox"/> Malayan Banking Berhad (Maybank)

Local Education Loans	
<input type="checkbox"/> RHB Bank Berhad (RHB)	<input type="checkbox"/> Malayan Banking Berhad (Maybank)

Overseas Education Loans	
<input type="checkbox"/> Malayan Banking Berhad (Maybank)	

Insurance Overdraft	
<input type="checkbox"/> RHB Bank Berhad (RHB)	

Commercial Loans

Property Address (if available/where applicable) *Please see Notes under 'For Official Use'	
Loan amount (if available)	\$

Local Commercial Secured Loans – (Secured OD, Short Term Loan/ Revolving credits/ Commercial Properties, HDB Shops and Industrial Property Financing (CHIPs))	
<input type="checkbox"/> DBS Bank Ltd (DBS)	<input type="checkbox"/> Oversea-Chinese Banking Corporation Limited (OCBC)
<input type="checkbox"/> Standard Chartered Bank (Singapore) Limited (SCB)	<input type="checkbox"/> Malayan Banking Berhad (Maybank)
<input type="checkbox"/> United Overseas Bank (UOB)	<input type="checkbox"/> HSBC Bank (Singapore) Limited (HSBC)
Local Commercial Unsecured Loans – (UOD, Micro Loan, Business Loan)	
<input type="checkbox"/> DBS Bank Ltd (DBS)	<input type="checkbox"/> Oversea-Chinese Banking Corporation Limited (OCBC)
<input type="checkbox"/> Standard Chartered Bank (Singapore) Limited (SCB)	
Local Commercial Loans – Asset Based Financing (ARP, Hire Purchase Commercial Vehicles, Equipment Financing) and Trade Financing (Import & Export Finance, Loan Insurance Scheme, Trade Facilities)	
<input type="checkbox"/> DBS Bank Ltd (DBS)	<input type="checkbox"/> Oversea-Chinese Banking Corporation Limited (OCBC)
<input type="checkbox"/> Standard Chartered Bank (Singapore) Limited (SCB)	

Trading Account

Securities Trading – (Equities, Bonds, Unit Trusts, ETFs, ETNs, OTC products, Utrade Edge)
<input type="checkbox"/> UOB Kay Hian Private Ltd (UOBKH)

I/We agree that PIAS may collect, use and disclose my/our personal data and a copy of my/our NRIC, which I/We have provided in this form, for the sole purpose of providing referral service(s) from PIAS providers and business partners, in accordance with the Personal Data Protection Act 2012 and PIAS's data protection policy (available at PIAS's website <https://www.proinvest.com.sg/pdpa>).

I/We have read and understood the above services are not provided by PIAS or its advisers. These are purely referral activities carried out by PIAS and/or its advisers. As such, PIAS and/or its advisers shall not be responsible or be held liable for the advice that was provided by PIAS referral partners.

Upon successful referral to PIAS partners, PIAS and its advisers may be eligible for referral fees ranging from 0.05% to 50% of the loan amount/fees chargeable depending on the type of referrals/will-writing offered.

Please kindly email pias.dataprotection@singlife.com if you wish to withdraw your consent.

Signature of Client

Signature of Adviser

Date

Date

Note: To facilitate the collection of this referral form, PIAS may accept the signed referral form and a copy of Client(s) NRIC in hardcopy and electronic forms. You agree that all signed referral forms and Client(s) NRIC (whether received in hardcopy or otherwise) which fulfil our internal processes and requirements shall be deemed to be valid, accurate and authentic and we shall be entitled to rely on them. You shall not hold us liable for acting or omitting to act in good faith on your consent given or purportedly given in this referral form.

For Official Use

Checker: _____

Received Date: _____

Loan Reference Number: _____

***Note: Advisers are required to inform Business Support at pias.newbusiness@singlife.com when Loan Reference Number, Property Address and Loan Amount have been confirmed**