

# TRANSFER OF OWNERSHIP FORM

## IMPORTANT INFORMATION

Please complete in ENGLISH and BLOCK CAPITALS.

If you make a mistake completing this form, simply cross out the error, note the correct details and initial each correction.

The policy of insurance is issued or assumed by Transamerica Life (Bermuda) Ltd. ("TLB").

Please read the Special Provisions before completing this form.

TLB has an online customer portal\*, "myTLB", where individual policy owners can access information relating to their insurance policies at anytime and anywhere. After registering on myTLB, you will be able to view and download copies of your policy documents and/or correspondences, including but not limited to, premium notices and annual statements electronically. As part of our sustainability efforts, TLB will cease to provide hard copies to policy owners who have a myTLB account. If you have a myTLB account but would still prefer to receive hard copies, you may inform us by sending us a written request.

\*Once the ownership transfer request has been processed, the former policy owner(s) will no longer be able to access the policy on myTLB.

 Select the box that applies

Insured's Name		Policy Number	<input type="text"/>
Alias Name (if any)	(1)	(2)	
Current Policy Owner's Name			
Alias Name (if any)	(1)	(2)	
Is this Policy subject to Collateral Assignment?	<input type="checkbox"/> Yes <input type="checkbox"/> No		
If Yes, please name assignee			
Alias Name (if any)	(1)	(2)	
<input type="checkbox"/> For good and sufficient consideration <input type="checkbox"/> As a gift for love and affection with no value consideration			

 Select the box that applies

### If the new policy owner is an INDIVIDUAL

Full Name (As shown on ID Card/ Passport)	<input type="checkbox"/> Mr <input type="checkbox"/> Mrs <input type="checkbox"/> Ms <input type="checkbox"/> Other		
	Given Name(s)	Surname	
Alias Name (As shown on ID Card/ Passport) (if any)	(1)	(2)	
Date of Birth	<input type="text"/> (dd/mm/yyyy)	Place of Birth	<input type="text"/>
Gender	<input type="checkbox"/> Male <input type="checkbox"/> Female		
ID Number and Passport Number	ID Number	<input type="text"/>	
	Nationality	Country of Issue	<input type="text"/>
	Passport Number	Date of Expiry	<input type="text"/> (dd/mm/yyyy)
If more than one nationality, please provide details:			
Nationality and Passport Number	Nationality	Country of Issue	<input type="text"/>
	Passport Number	Date of Expiry	<input type="text"/>

Select the box that applies

**If the new policy owner is an INDIVIDUAL (Continued)**

Permanent Address (if residential address is temporary)	Number/Street/Building		
	City	Province	
	Country	Postal Code	
Phone Number	_ _ _ _  -  _ _ _ _  -  _ _ _ _ _ _ _ _ _ _  Country Code Area Code Phone Number		
Mobile	_ _ _ _  -  _ _ _ _  -  _ _ _ _ _ _ _ _ _ _  Country Code Area Code Phone Number		
Email			
Occupation Title		Occupation Industry	
Purpose of this Policy Ownership Change Request			

Select the box that applies

**If the new policy owner is an ENTITY (Please select)**

<input type="checkbox"/> Corporate	<input type="checkbox"/> Trust Dated	_ _ _ _ _ _ _ _ _  (dd/mm/yyyy)	<input type="checkbox"/> Other
Full Name			
Entity ID Number	_ _ _ _ _ _ _ _ _	Place of Incorporation	
	<input type="checkbox"/> Certificate of Incorporation <input type="checkbox"/> Business Registration	(City, Country)	
Date of Incorporation	_ _ _ _ _ _ _ _ _  (dd/mm/yyyy)	Business Nature	
Registered Office Address	Number/Street/Building		
	City	Province	
	Country	Postal Code	
Business Address (if different from registered office address)	Number/Street/Building		
	City	Province	
	Country	Postal Code	
Phone Number	_ _ _ _  -  _ _ _ _  -  _ _ _ _ _ _ _ _ _ _  Country Code Area Code Phone Number		
Email			
Purpose of this Policy Ownership Change Request			

TLB 1325SGE TOF 0325

Select the box that applies

## Correspondence and Billing Address

All correspondence, including but not limited to, notices of premium due and lapse notices will be sent to the new policy owner's residential or business address as indicated above, unless an alternative address is provided.

Alternative address

Number/Street/Building			
City	Province		
Country	Postal Code		

Before the death of the insured, the new policy owner alone shall be entitled to exercise all rights granted by the policy or allowed by TLB under the policy, including the right to assign the policy and the right to transfer ownership. If the new policy owner is a partnership, all rights of the new policy owner belong to the partnership as constituted at the time a right is exercised. This transfer of ownership revokes any previous designations of contingent policy owner, regardless of whether a contingent policy owner is designated on this transfer of ownership. If this transfer of ownership includes a designation for a contingent policy owner, then if the new policy owner, or a contingent policy owner after becoming a policy owner, predeceases the insured, the next successive living contingent policy owner designated shall be the new policy owner of the policy. If there is no surviving contingent policy owner, the estate of the deceased contingent policy owner (or the estate of the last contingent policy owner who became the policy owner) shall own the policy.

Beneficiary not changed: This transfer of ownership does not change the beneficiary of the policy. Unless the right to change the beneficiary is specifically exercised by the new policy owner, the beneficiary of the policy shall be the same as the beneficiary of record at the time of this transfer of ownership.

TLB may rely solely upon the signature of the policy owner(s) under this transfer of ownership for any receipt, release waiver, transfers or other instruments, to whomsoever made. The validity of this transfer of ownership is hereby guaranteed by the undersigned. The signature on this transfer of ownership is a warranty that the undersigned is legally capable of executing this transfer of ownership and that no proceedings in insolvency or bankruptcy have been instituted by or against the undersigned. If there is more than one policy owner, the signature of all policy owners is required to exercise any right in the policy.

## Personal Information Collection Statement

Transamerica Life (Bermuda) Ltd. ("TLB") is committed to complying with the Personal Data Protection Act 2012 ("PDPA") and any other applicable laws and regulations in relation to the collection, use, disclosure, transfer, retention and storage of your personal data.

### Collection

From time to time, it will be necessary for customers or other persons to supply TLB with personal data in connection with the establishment or continuation of business relationship, or provision of products or services. Failure to supply such data may result in TLB being unable to establish or continue the business relationship, or provide you with our products and services.

### Purpose

The personal data collected by TLB on this form, any supplementary forms or documents received, as part of your insurance application, any claims documentation or any other personal data collected during the course of other dealings with TLB may be used or disclosed from time to time for the following purposes:

- a) processing, evaluating and underwriting your insurance application, any subsequent insurance applications or forms and any alterations, variations, cancellations, surrenders, assignments or renewals of your insurance policy;
- b) administering this insurance policy and providing services, and managing your account including access to and maintenance of any online platform in relation to your insurance policy;
- c) conducting credit checks and ensuring ongoing credit worthiness;
- d) conducting medical or health reference checks;
- e) investigating, defending, analyzing, processing and paying any claims under your insurance policy or an insurance policy under which any moneys may be payable to you or other persons entitled under such insurance policy;
- f) invoicing and collecting premiums and outstanding amounts from you;
- g) performing any functions and activities related to insurance products and/or services, market research, customer surveys and analysis or obtaining legal and professional advice;
- h) resolving complaints, internal training and customer service quality assessment;
- i) arranging reinsurance;
- j) conducting and compiling statistics to study and evaluate behaviour, preferences and interests, develop new products and improve our services, identify trends, plan and execute business transactions;
- k) exercising any rights TLB may have in connection with the provision to you of products or services from time to time;
- l) marketing and promoting products and services to you via corporate events, telephone calls, SMS, fax, mail and electronic mail, where specifically or deemed consented to or where it is permissible under applicable laws or regulations;
- m) other ancillary purposes which are directly related to and serve to fulfill the above purposes; and
- n) complying with the requirements under any laws and regulations, codes, guidelines, court order and requests from any local or foreign regulators, governmental bodies, or industry recognised bodies (whether within or outside Singapore) that is assumed by or imposed on TLB or any related companies of TLB including TLB's ultimate parent company, and any companies which are directly or indirectly held or controlled by such ultimate parent company (the "related companies") by reason of its financial, commercial, business or other interests or activities in or related to the jurisdiction of the relevant local or foreign regulators, governmental bodies, or industry recognised bodies.

It is TLB's policy not to keep personal data for longer than is necessary for the fulfillment of the purpose for which that data is or is to be used.

## Personal Information Collection Statement (Continued)

Select the box that applies

### Transferees

The personal data collected by TLB will be kept confidential but subject to any applicable laws, TLB may disclose your personal data for the above purposes to the following classes of transferees (whether in Singapore or elsewhere):

- a) third party agents, contractors, assignees and advisors who provide administrative, communications, computer, payment, risk intelligence services, security or other services which assist us to carry out the above purposes (including medical service providers, emergency assistance service providers, telemarketers, mailing houses, IT service providers and data processors);
- b) any service provider that TLB collaborate with to provide its insurance products and services;
- c) in the event of a claim, loss adjudicators, claims investigators and medical advisors;
- d) in the event of default, debt collectors and recovery agents;
- e) in the event of dispute, Financial Industry Disputes Resolution Centre Ltd;
- f) insurance reference bureaus or credit reference bureaus;
- g) reinsurers and reinsurance brokers;
- h) any insurance intermediary which services this insurance policy (including your financial adviser representative (if you have one), and its successors or assigns);
- i) the owner of the policy (if different from the insured);
- j) TLB's legal and professional advisors;
- k) TLB's related companies;
- l) any actual or proposed assignee, transferee, participant or sub-participant of our rights or business;
- m) local insurance associations; and
- n) government agencies and authorities as required or permitted by law.

TLB may also use and disclose your personal data otherwise with your prior consent to the relevant use or disclosure.

### Transfer of data outside Singapore

In connection with the purposes outlined above, TLB may transfer your personal data outside Singapore to any of the classes of transferees set out above ("transferees"). Such transferees may be situated in jurisdictions including but not limited to Hong Kong, Bermuda, United States, Netherlands, Switzerland and/or the United Kingdom where there may or may not be in place data protection laws which are substantially similar to, or serve the same purposes as, any mandatory data protection laws of Singapore. We will use safeguards to ensure that appropriate levels of protection necessary to maintain the security of your personal data are in place and that any transferred personal data is processed only in accordance with the Singapore PDPA and any other applicable laws and regulations.

**Please indicate your consent to the transfer of your data outside Singapore by ticking the box below. Failure to provide your consent will result in TLB being unable to establish or continue the business relationship, or provide you with our products and services.**

**I/We consent to the transfer of my/our personal data outside Singapore.**

### Value added service and programs

TLB has entered and may enter into arrangements with third party service providers within or outside of Singapore ("program providers") for the offer to you of value added services and programs including but not limited to lifestyle concierge services, global security and evacuation services, wellness and health-related services and reward/loyalty programs. You may be eligible to be offered such services and/or participation in such programs by TLB and/or program providers. With your consent, TLB may use your name and contact details (address, email and telephone number), or provide such details to program providers, to send you communications relating to the offer of such services and programs by mail, email, telephone, SMS or other forms of communications. TLB will not receive any monetary gain from such program providers and has engaged such parties for the purpose of relationship building with you.

**I/We do not consent to receiving communications relating to the value added services and programs as described above.**

### Financial and insurance products and services

With your consent, TLB may use or provide your name and contact details (address, email and telephone number), details on the insurance products purchased (including policy details), your transaction pattern and behaviour, financial background and demographic information to its related companies and/or other third party financial institutions and insurance providers within or outside of Singapore ("financial institutions and insurance providers") to send you communications regarding financial and insurance products that may be offered by TLB, its related companies and/or financial institutions and insurance providers from time to time by mail, email, telephone, SMS, or other forms of communications.

**I/We do not consent to receiving communications relating to financial and insurance products and services as described above.**

**If at any time you wish to withdraw your consent to receiving communications related to either the value added services and programs and/or financial and insurance products and services, please notify us by sending a written request to our Data Protection Officer (refer to the section headed "Access to and correction of personal data" below for contact details). TLB will, without charge to you, ensure that you are not included in any such future communications that may be offered by TLB, its related companies, program providers and/or financial institutions and insurance providers from time to time.**

### Access to and correction of personal data

It is mandatory to provide all of the personal data requested on the application form. Failure to provide all the personal data requested on this Transfer of Ownership Form may mean that TLB is unable to process this transfer of ownership.

You may seek access to and request correction of any personal data TLB holds about you by sending a written request to: The Data Protection Officer, Transamerica Life (Bermuda) Ltd., Singapore Branch Office, 18 Cross Street #12-02, Cross Street Exchange, Singapore 048423.

A reasonable fee may be charged to offset any administrative and actual costs incurred by us in complying with your data access requests.

Select the box that applies

### Assignment by:

#### Signature of Current Policy Owner

Signed at	(Country)	Date	_____ (dd/mm/yyyy)
Name			
Phone Number	_____-_____-_____ (Country Code Area Code Phone Number)		
Signature (include Title, if Corporation or Trust)		<b>X</b>	

#### Signature of Witness to Current Policy Owner

Signed at	(Country)	Date	_____ (dd/mm/yyyy)
Name			
ID Number		Signature	
Type <input type="checkbox"/> NRIC <input type="checkbox"/> Passport <input type="checkbox"/> Other _____		<b>X</b>	
Address			

#### Signature of New Policy Owner\*

Signed at	(Country)	Date	_____ (dd/mm/yyyy)
Name			
Phone Number	_____-_____-_____ (Country Code Area Code Phone Number)		
Signature (include Title, if Corporation or Trust)		<b>X</b>	

\* Note:  
To update your contact information, please submit the Personal Information Update Form available from your financial adviser representative.

**Assignment by: (Continued)**

**Signature of Witness to New Policy Owner**

Signed at	(Country)	Date	<input type="text"/> (dd/mm/yyyy)
Name	<input type="text"/>		
ID Number		Signature	
Type	<input type="text"/>	<input type="text"/>	
<input type="checkbox"/> NRIC			
<input type="checkbox"/> Passport			
<input type="checkbox"/> Other _____		<b>X</b>	
Address	<input type="text"/>		

**Signature of Collateral Assignee (if any)\***

Signed at	(Country)	Date	<input type="text"/> (dd/mm/yyyy)
Name	<input type="text"/>		
Phone Number	<input type="text"/> - <input type="text"/> - <input type="text"/>		
		Country Code	Area Code
Signature (include Title, if Corporation or Trust)		<input type="text"/>	


**Signature of Witness to Collateral Assignee (if any)**

Signed at	(Country)	Date	<input type="text"/> (dd/mm/yyyy)
Name	<input type="text"/>		
ID Number		Signature	
Type	<input type="text"/>	<input type="text"/>	
<input type="checkbox"/> NRIC			
<input type="checkbox"/> Passport			
<input type="checkbox"/> Other _____		<b>X</b>	
Address	<input type="text"/>		

\* Note:  
To update your contact information, please submit the Personal Information Update form available from your financial adviser representative.

**Transfer of Ownership**

This assignment has been recorded at the TLB's branch office. TLB assumes no legal responsibility for the sufficiency or validity of the assignment.

Date recorded	 (dd/mm/yyyy)	By	
---------------	---	----	--

**Special Provisions**

This transfer of ownership includes any rider or supplementary agreement attached or relating to the policy. This transfer of ownership shall apply to any policy issued in exchange for or as a conversion of the policy. If this transfer of ownership is made to any trust, TLB shall not be bound by any trust agreement or responsible for the application of any policy proceeds paid to trustee of any such trust.

- Be sure to show the policy number and insured's name on this form. Use a separate form for each policy.
- Do not send the policy. Once the transfer of ownership has been recorded, a notice will be sent to both the new policy owner and the current policy owner as confirmation of the change.