



CHARTERED TRUSTEE

APPLICATION FORM

INSTRUCTION:

To apply for recognition as Chartered Trustee of the Singapore Trustees Association (STA), you may first scan a copy of the completed form to secretariat@sta.org.sg. But please note that the completed original copy of the form must also be sent to the following address:

Secretariat
Singapore Trustees Association
10 Anson Road #29-04A,
International Plaza,
Singapore 079903

A. PERSONAL INFORMATION

| | | | |
|-----------------|---|----------------|--------------------------|
| Salutation: | Mr / Ms / Mrs / Dr <i>(Please select one)</i> | | |
| Last Name: | | First Name: | |
| NRIC/FIN: | | | |
| Address: | | | |
| Gender: | Male <input type="checkbox"/> | Female | <input type="checkbox"/> |
| Citizenship: | | | |
| Nationality: | | Date of Birth: | DD/MM/YY |
| Contact Number: | <i>(Office)</i> | | <i>(Mobile)</i> |
| Email: | | | |

B. CURRENT EMPLOYMENT

| | |
|-----------------------------------|--|
| Name of Company | |
| Company Address | |
| Designation | |
| Department (if applicable) | |

C. CONTRIBUTION TO INDUSTRY

The Chartered Trustee award is given in recognition of those who have contributed expertise and significant years of their career to the trust and wealth management industry in Singapore.

To qualify for the Chartered Trustee award, an applicant must have at least 15 years of work experience in trust business services, of which 5 years must be in Singapore.

Please state your years in providing trust business services:

| | Name of Company and Jurisdiction | Role/function | Duration |
|---------------------|---|----------------------|-----------------|
| 20xx to 20xx | | | |
| 20xx to 20xx | | | |
| 20xx to 20xx | | | |

D. ACADEMIC/PROFESSIONAL QUALIFICATIONS, AWARDS AND ACHIEVEMENTS

Please provide details of qualifications/awards/achievements received:

| Qualifications/Award/Achievement | Year Attained |
|---|----------------------|
| | |
| | |
| | |
| | |

Please highlight work/projects/engagements/involvement you have undertaken to develop the Singapore trust industry or other areas of community involvement:

E. AREAS OF INTEREST

Chartered Trustees of STA are **mentors** for the industry, **role models** for young practitioners and they are recognized as **industry leaders** who champion the mission of raising the bar for those providing trust business services in support of Singapore’s growth as a premier wealth management hub. The STA would like to encourage successful applicants to actively support the constantly growing areas of the trust industry and in particular, to encourage applicants to contribute in the following areas, where appropriate:

As a Chartered Trustee of STA, I would be keen to contribute in the following areas:

- Mentoring and Career Guidance
 - Speaking at STA events
 - Participation in industry workgroups
 - Others (please specify):
-
-

F. FIT & PROPER DECLARATION

Chartered Trustees are expected to be fit and proper and uphold integrity and professional conduct. Please complete the following declaration:

| Within the past 10 years, have you: | | YES | NO |
|-------------------------------------|--|--------------------------|--------------------------|
| 1. | Been refused the right or restricted in your right to carry on any trade, business or profession for which a specific licence, registration or other authorisation is required by law in any jurisdiction? | <input type="checkbox"/> | <input type="checkbox"/> |
| 2. | Been issued a prohibition order under any regulations administered by The Monetary Authority of Singapore or been prohibited from operating in any jurisdiction by any financial services regulatory authority? | <input type="checkbox"/> | <input type="checkbox"/> |
| 3. | Been censured, disciplined, suspended or refused membership or registration by The Monetary Authority of Singapore, any other regulatory authority, an operator of a market or clearing facility, any professional body or government agency, whether in Singapore or elsewhere? | <input type="checkbox"/> | <input type="checkbox"/> |
| 4. | Been convicted of any offence, served any term of imprisonment or is being subject to any pending proceedings which may lead to a conviction of any offence, under any law in any jurisdiction? | <input type="checkbox"/> | <input type="checkbox"/> |

| | | | |
|---|---|--------------------------|--------------------------|
| 5. | Had any civil penalty enforcement action taken against you by The Monetary Authority of Singapore or any other regulatory authority under any law in any jurisdiction? | <input type="checkbox"/> | <input type="checkbox"/> |
| 6. | Been the subject of any investigations or disciplinary proceedings or been issued a warning or reprimand by The Monetary Authority of Singapore Authority, any other regulatory authority, an operator of a market or clearing facility, any professional body or government agency, whether in Singapore or elsewhere? | <input type="checkbox"/> | <input type="checkbox"/> |
| 7. | Been or is subject to disciplinary proceedings by your current or former employer(s), whether in Singapore or elsewhere? | <input type="checkbox"/> | <input type="checkbox"/> |
| 8. | Had any judgment (in particular, that associated with a finding of fraud, misrepresentation or dishonesty) entered against you in any civil proceedings or is a party to any pending proceedings which may lead to such a judgment, under any law in any jurisdiction? | <input type="checkbox"/> | <input type="checkbox"/> |
| 9. | Accepted civil liability for fraud, misrepresentation or dishonesty under any law in any jurisdiction? | <input type="checkbox"/> | <input type="checkbox"/> |
| 10. | Been or is subject to a judgment debt which is unsatisfied or been adjudicated a bankrupt and the bankruptcy is undischarged, either in whole or in part, whether in Singapore or elsewhere? | <input type="checkbox"/> | <input type="checkbox"/> |
| <p>*If you have answered 'YES' to any of the above questions, please provide additional information here:</p> | | | |

G. DECLARATION

- I hereby affirm that the information given above are true and complete. I understand that any false or misleading information provided in this form may result in the withdrawal of the ChT title if it is found out subsequent to the approval of this registration.
- I authorise STA to obtain and verify any information about me as it deems fit and at its discretion (including performing reference checks) and release from liability all persons or entities supplying such information.
- I authorise STA to contact and invite me for any of the initiatives listed in Section E of this application form.

- I hereby agree to comply with the Terms for Use of the ChT title (as amended from time to time).
- I hereby agree and will cease using the ChT title when I am no longer providing trust business services.
- I hereby agree to join STA as a member when I no longer work for a member of STA.
- I acknowledge that STA reserves the right to reject my registration without giving any reason.
- I hereby consent to the publication of my name as a Chartered Trustee on the STA website, social media, and other STA publications.

Name: _____

Signature: _____

Date: _____

Singapore Trustees Association

10 Anson Road #29-04A, International Plaza, Singapore 079903

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email: secretariat@sta.org.sg

www.sta.org.sg