



**Your unit trust funds are showing good returns. You're not here to take your reward.**

**Who gets it?**

**CIMB** WEALTH ADVISORS

## What Is Trust Nomination Service?

Has it occurred to you that your unit trust investments could be passed on to your loved ones should something unthinkable happen to you?

Do you know that without the necessary preparations for the inevitable, your loved ones may be subjected to lengthy court procedures and a delay of two years before your assets are distributed?

The first of its kind in Malaysia, the Trust Nomination Service lets you nominate up to 4 important people in your life to be the beneficiaries of your unit trust investments.

By subscribing to this Trust Nomination Service, you are safely setting aside funds for your loved ones without passing through probate. So, you can be rest assured that the funds will be distributed to your beneficiaries without delay and with minimum hassle, just the way you have intended.

### Benefits:

- ▶ Preserve your unit trust investments for your loved ones.
- ▶ Hassle free transfer of your unit trust investment to your loved ones.
- ▶ Offers you peace of mind with the knowledge that your hard earned investments will be passed on to your intended beneficiaries.
- ▶ Protect your investments by naming your choice of beneficiary and prevent it from going into the wrong hands.

### How do I set up a Trust Nomination?

- ▶ Unit trust investors can name up to 4 beneficiaries for each CIMB Wealth Advisors unit trust account.
- ▶ The fees involved in setting up a Trust Nomination Account:

Investment Amount	Set Up Fee
Less than RM20,000	RM50
RM20,000 and above	RM100



- ▶ Payment can be made via credit card or cheque payable to “CIMB Trustee Berhad for Trust Nomination” during the signing up for this Trust Nomination Service at CIMB Wealth Advisors’ office or branches.



This service is made available in collaboration with CIMB Trustee Berhad.

### How to start?

For new unit holder (individual & joint), the following documents are required:

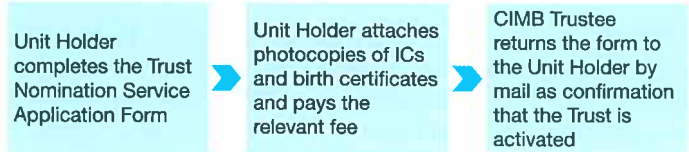
- ▶ Unit trust Account Opening Form
- ▶ Transaction Form
- ▶ Photocopy of NRIC – 2 copies each from Principal and Joint holder (if any)
- ▶ Photocopy of NRIC/ Birth Certificate – Beneficiary(s)
- ▶ Trust Nomination Service Application Form & Declaration of Trust
- ▶ Cheques issued separately to “CIMB Wealth Advisors Berhad” (for unit trust investment) and “CIMB Trustee Berhad for Trust Nomination” (for Set Up Fee)

Note – in the case of joint account, to set up Trust Nomination, both Principal and Joint holder must agree and sign on the Trust Nomination Service Application Form.

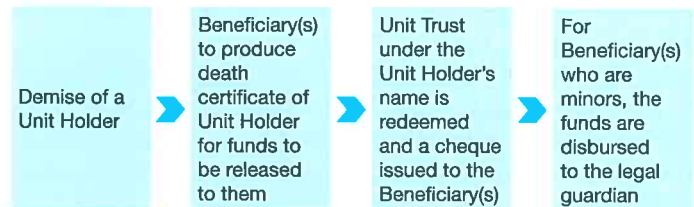
For existing unit holder, the following documents are required:

- ▶ Photocopy of NRIC – 1 copy each from Principal and Joint holder (if any)
- ▶ Photocopy of NRIC/ Birth Certificate – Beneficiary(s)
- ▶ Trust Nomination Service Application Form & Declaration of Trust
- ▶ Cheque payable to “CIMB Trustee Berhad for Trust Nomination” (for Set Up Fee)

### Step by step process to activate the Trust Nomination Service



### Step by step process for the Beneficiary(s) to access the Unit Trust after the demise of the Unit Holder



Act now. Call us at **603 7718 3000** and we'll be happy to help.

**Disclaimer:** This brochure/leaflet is not to be construed as a contract. The terms and conditions in relation to the service offered are set out in the Declaration of Trust document issued by CIMB Trustee Berhad.

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