



Click here to visit  
ProviTrust Portal



Scan with  
**singpass**  
app to login

**EPPL**  
Digital



PRECEPTS  
TRUSTEE

**ProviTrust**

ProviTrust Portal is hosted on cloud with Amazon Web Services



<https://app.provitrust.com/live>

**Before Portal Submission,  
please take note of the following:**

## Settlor (Client)



**singpass**

Only via Singpass Login

Singpass is the only method to login to **ProviTrust** Portal. You need to have your Singpass or 'Tap QR code' via Singpass app with your mobile phone



Singpass Portal

**REQUIRED**

You need to ensure your personal information at Singpass Portal is updated, especially your email address. If you have just updated at Singpass Portal, do allow half an hour to one hour's time before you log into **ProviTrust** Portal again

**myinfo**

Via MyInfo

Your personal information is being populated via MyInfo, thus **no amendments** are allowed. Do also note this – Correspondences will be sent via email after submission

Trust Introducer's Details

Trust Introducer Code

Please fill in your Trust Introducer's Code if you have been referred by a Precepts Trust Introducer.

**Note:** If you are referred by an Estate And Succession Practitioner, do remember to key in the Trust Introducer Code after getting your particulars populated from MyInfo. (For Settlor)

## Appointing an Individual Trustee



Basic Criteria of a Trustee

- Singapore Citizen
- Permanent Resident
- A person with an Employment Pass
- Or a person with a Dependent Pass

Individual Trustee's  
Required Fields



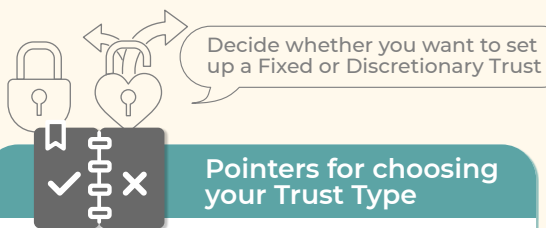
**REQUIRED**

- |                       |                       |
|-----------------------|-----------------------|
| • Title               | • Race                |
| • Name as per NRIC    | • Residential Address |
| • Date of Birth       | • Home Phone Number   |
| • Singapore ID Number | • Mobile Number       |
| • Nationality         | • Email               |



Guidelines for choosing

- Age
- Good health and no mental capacity issues
- To be trustworthy and accountable
- Have good relationship with your beneficiaries



### Pointers for choosing your Trust Type

- Appoint **Individual Trustee**, you can choose to set up your **ProviTrust** as **Fixed or Discretionary Trust**
- Appoint **Professional Trustee (Precepts)**, you can only set up your **ProviTrust** as **Discretionary Trust**



## Beneficiaries



### How many Beneficiaries are allowed?

- **Fixed Trust** – One group of up to 5 beneficiaries
- **Discretionary Trust** – Two groups of up to 5 beneficiaries each for both main group and substitute group

REQUIRED

### Your Beneficiaries' Required Fields

- Title
- Name of Beneficiary
- Relationship
- Nationality of Beneficiary
- Singapore ID No.
- Date of Birth
- Residential Address
- UEN No. (Applicable for Non-Profit Organisation)



Plan the distribution manners for each of your beneficiary

### Distribute to your Named Beneficiaries

- Percentage of Distribution (%)
- Vesting Age (Applicable for Individual)
- Vesting Period (Applicable for Non-Profit Organisation)
- Amount for each Pay-Out
- Frequency of Distribution
  - Monthly
  - Quarterly
  - Half-Yearly
  - Yearly
  - Lump Sum
  - Trustee to decide depending on circumstances

## What happens after the submission has been completed?



1

PTL approves the **ProviTrust** application within 5 business days

2

### 2.1 - With ESP Code

PTL to contact the respective ESP to obtain his or her Witness' details (Name, NRIC No.)

### 2.2 - Without ESP Code

PTL to contact the Client to obtain his or her Witness' details (Name, NRIC No.)

3

Settlor, Trustee and Witness will then have to e-sign on the Trust Deed and or Letter of Wishes (LOW) in proper sequence

4

### Signing sequence:

Settlor  
Settlor's Witness  
Trustee  
Trustee's Witness

5

### Signing sequence:

Settlor  
Settlor's Witness

6

All E-Signatures completed, to remind the Settlor and Trustee to keep a copy of the Trust Deed and or Letter of Wishes (LOW)

7

Settlor and Trustee will be able to retrieve the Trust Deed and or Letter of Wishes (LOW) at any one time via the ProviTrust Portal's Client Dashboard. (Do click on 'More details' below to do so accordingly)

8

An automated email will then be sent to the Settlor with the specific instructions to make the CPF nomination to his or her appointed Trustee

**ProviTrust**

is the maiden trust solution of EPPL Digital. ProviTrust and its Portal is set up and managed by Precepts Trustee Ltd.



ProviTrust Portal does not save your progress halfway. Your application data in the ProviTrust Portal will not be saved until you complete the whole process with the payment made.