



AIA Bhd. 200701032867 (790895-D)  
AIA PUBLIC Takaful Bhd. 201101007816 (935955-M)



## Application for Partial Withdrawal / Top-up and Fund Related Alteration

Permohonan untuk Pengeluaran Separa / Tokok dan Perubahan Berkaitan Dana

Agent Code / Kod Ejen

Agency Code / Kod Agensi

Agent Tel No. / No. Tel Ejen

Policy / Certificate Number

Nombor Polisi / Sijil

Name of Insured / Person Covered

Nama Insured / Orang Dilindungi

Insured / Person Covered NRIC No. (For Malaysian Citizen Only) / Passport No. (For Non-Malaysian Citizen Only)

No. KP (Untuk Warganegara Malaysia Sahaja) / No. Pasport (Untuk Bukan Warganegara Malaysia Sahaja) Insured / Orang Dilindungi

### SECTION 1 / SEKSYEN 1 - TYPE OF SERVICE REQUEST / JENIS PERMOHONAN PERKHIDMATAN

Instruction : Please fill in / tick box where appropriate

Arahan : Sila isi dalam / tanda pada petak yang berkenaan

- ☐ A. Partial Withdrawal / Pengeluaran Separa
- ☐ B. Partial Withdrawal - Reduce Basic Sum Assured / Basic Sum Covered by (This option only applies to Takaful Product A-Life Legasi)  
Pengeluaran Separa - Pengurangan Jumlah Asas Diinsuranskan/Jumlah Asas Dilindungi dengan\*
- ☐ Amount Jumlah ☐ Percentage Peratusan
- ☐ C. Withdrawal from Wealth Account/Pengeluaran daripada Akaun Wealth
- ☐ D. Partial Withdrawal Accumulation Value (Universal Life) / Pengeluaran Nilai Terkumpul
- ☐ E. Partial Withdrawal Hybrid Plan / Pengeluaran Separa Pelan Hibrid
- ☐ F. Fund Switching / Pertukaran Dana
- ☐ G. Change of Investment Allocation / Perubahan Peruntukan Pelaburan
- ☐ H. Ad Hoc Top-Up / Premium / Caruman Tokok Ad Hoc
- ☐ I. Scheduled Top-Up / Premium / Caruman Tolak Berjadual
- ☐ J. Automatic Fund Rebalancing / Pengimbangan Semula Dana Automatik
- ☐ K. Cross Subsidy / Subsidi Silang

### A - PARTIAL WITHDRAWAL / PELUARAN SEPARA

| Fund Name / Nama Dana | Amount / Amaun (RM) | Percentage / Peratusan (%) |
|-----------------------|---------------------|----------------------------|
|                       |                     |                            |
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For Office Use  
Untuk Kegunaan Pejabat

**B - PARTIAL WITHDRAWAL - REDUCE BASIC SUM ASSURED BY AMOUNT OR BY PERCENTAGE****PENGELUARAN SEPARA - PENGURANGAN JUMLAH ASAS DIINSURANSKAN DENGAN JUMLAH ATAU DENGAN PERATUSAN***(This option only applies to Takaful Product A-Life Legasi)*

| Fund Name / Nama Dana | Amount / Amaun (RM) | Percentage / Peratusan (%) |
|-----------------------|---------------------|----------------------------|
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**C - WITHDRAWAL FROM WEALTH ACCOUNT/ PENGELUARAN DARIPADA AKAUN WEALTH**

| Fund Name / Nama Dana | Amount / Amaun (RM) | Percentage / Peratusan (%) |
|-----------------------|---------------------|----------------------------|
|                       |                     |                            |
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**D - PARTIAL WITHDRAWAL ACCUMULATION VALUE (UNIVERSAL LIFE) / PENGELUARAN NILAI TERKUMPUL****This section is only applicable for Policy Number starting with an alphabet followed by 9 digits.*****Bahagian ini hanya berkenaan bagi Nombor Polisi bermula dengan abjad diikuti dengan 9 angka.***
☐ Accumulation Value (Universal Life) / Nilai Terkumpul
 RM 
**E - PARTIAL WITHDRAWAL HYBRID PLAN / PENGELUARAN SEPARA PELAN HIBRID**

| Fund Name / Nama Dana | Amount / Amaun (RM) | Percentage / Peratusan (%) |
|-----------------------|---------------------|----------------------------|
|                       |                     |                            |
|                       |                     |                            |
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**Bank Account Information / Maklumat Akaun Bank****Policy / Certificate Owner's / Assignee's Name / Nama Pemilik Polisi / Sijil / Pemegang Serah Hak***(as appearing in bank account statement / seperti yang tertera dalam penyata akaun bank)***NRIC No. (For Malaysian Citizen only) or Passport No. (For Non-Malaysian Citizen only) / Company Registration No.*****No. KP (Untuk Warganegara Malaysia sahaja) atau No. Pasport (Untuk Bukan Warganegara Malaysia sahaja) / No. Pendaftaran Syarikat****(as appearing in bank account statement / seperti yang tertera dalam penyata akaun bank)***Bank Name / Nama Bank****E-mail Address / Alamat E-mel****Bank Account No. / No. Akaun Bank****Mobile No. / No. Telefon Bimbit**

## F - FUND SWITCHING / PERTUKARAN DANA

Please state percentage in multiple of 5% / Sila nyatakan peratusan dalam gandaan 5%

Please indicate the % from the Existing Fund to be transferred to the Target Fund in %

Sila nyatakan % daripada Dana Sedia Ada untuk ditukar kepada Dana Sasaran dalam %

| Fund Name / Nama Dana (From / Daripada) |   |                       |   |
|-----------------------------------------|---|-----------------------|---|
| Fund Name / Nama Dana                   | % | Fund Name / Nama Dana | % |
|                                         |   |                       |   |
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|                                         |   |                       |   |

| Target Fund / Dana Sasaran ( To / Kepada ) |   |                       |   |
|--------------------------------------------|---|-----------------------|---|
| Fund Name / Nama Dana                      | % | Fund Name / Nama Dana | % |
|                                            |   |                       |   |
|                                            |   |                       |   |
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## G - CHANGE OF INVESTMENT ALLOCATION (State new allocation in the table)

PERUBAHAN PERUNTUKAN PELABURAN (Nyatakan peruntukan baharu dalam jadual)

1. ☐ Regular Premium/Contribution  
Sumbangan/Premium Berkala

| Fund Name / Nama Dana | Percentage / Peratusan (%)<br>Please state percentage in multiple of 5%<br>Sila nyatakan peratusan dalam gandaan 5% |
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|                       |                                                                                                                     |
| Total / Jumlah        | 100%                                                                                                                |

2. ☐

| Fund Name / Nama Dana | Percentage / Peratusan (%)<br>Please state percentage in multiple of 5%<br>Sila nyatakan peratusan dalam gandaan 5% |
|-----------------------|---------------------------------------------------------------------------------------------------------------------|
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| Total / Jumlah        | 100%                                                                                                                |

**H - AD HOC TOP-UP / PREMIUM / CARUMAN TOKOK AD HOC**

**Ad Hoc Top-Up Premium / Contribution**  
*Premium / Caruman Tokok Ad Hoc*

RM \_\_\_\_\_

Investment Allocation to follow: / *Peruntukan Pelaburan adalah mengikut:*

**Current / Semasa**

☐ **New allocation** (Not applicable to Universal Life, state new allocation in the table)

**Peruntukan baharu** (Tidak berkenaan bagi Universal Life, nyatakan peruntukan baharu dalam jadual)

| Fund Name / Nama Dana | Percentage / Peratusan (%)<br>Please state percentage in multiple of 5%<br><i>Sila nyatakan peratusan dalam gandaan 5%</i> |
|-----------------------|----------------------------------------------------------------------------------------------------------------------------|
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|                       |                                                                                                                            |
| Total / Jumlah        | 100%                                                                                                                       |

### I - SCHEDULED TOP-UP / PREMIUM / CARUMAN TOKOK BERJADUAL

*Premium / Caruman Tokok Berjadual*

RM  yearly / tahunan

Investment Allocation to follow: / Peruntukan Pelaburan adalah mengikut:

**Current / Semasa**

☐ **New allocation** (Not applicable to Universal Life, state new allocation in the table)

**Peruntukan baharu** (Tidak berkenaan bagi Universal Life, nyatakan peruntukan baharu dalam jadual)

| Fund Name / Nama Dana | Percentage / Peratusan (%)<br>Please state percentage in multiple of 5%<br>Sila nyatakan peratusan dalam gandaan 5% |
|-----------------------|---------------------------------------------------------------------------------------------------------------------|
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|                       |                                                                                                                     |
| Total / Jumlah        | 100%                                                                                                                |

## J - AUTOMATIC FUND REBALANCING / PENGIMBANGAN SEMULA DANA AUTOMATIK

The frequency of Automatic Fund Rebalancing is quarterly / *Kekerapan Pengimbangan Semula Dana Automatik dilakukan secara suku tahunan*

**1. To activate this option / Untuk mengaktifkan pilihan ini**

Investment Allocation to follow / Peruntukan Pelaburan adalah mengikut:

☐ **Same as Single Premium / Sama dengan Premium Tunggal**

☐ **New allocation as stated in the table provided / Peruntukan baharu seperti yang dinyatakan dalam jadual yang disediakan**

Note: Balance unit will be auto switched to the new allocation

*Nota: Baki unit akan ditukarkan secara automatik kepada peruntukan pelaburan yang baharu*

2. ☐ To terminate this option on

Untuk menamatkan pilihan ini pada

DD / HH MMM / BBB YYYY / TTTT

☐ **OR to terminate this option after**

no. of times.

*ATAU untuk menamatkan pilihan ini selepas turutan ke*

| Fund Name / Nama Dana | Percentage / Peratusan (%) |
|-----------------------|----------------------------|
|                       |                            |
|                       |                            |
|                       |                            |
|                       |                            |
|                       |                            |
|                       |                            |
| Total / Jumlah        | 100%                       |

**K - CROSS SUBSIDY- AUTHORISATION OF POLICY / CERTIFICATE CHARGES DEDUCTION FROM SAVING ACCONT (SAVER PREMIUM/ CONTRIBUTION)**

**SUBSIDY SILANG - KEBENARAN BAGI PEMOTONGAN CAJ-CAJ POLICY / SIJIL DARI AKAUN SIMPANAN (PREMIUM / CARUMAN SAVER)**

☐ I/We allow AIA to deduct the Account Value from Savings Account to pay all the Policy / Certificate Charges in the event the Account Value from Protection Account is insufficient to pay all the Policy / Certificate Charges. / Saya/Kami membenarkan AIA untuk memotong Nilai Akaun dari Akaun Simpanan untuk membayar semua Caj-caj Polisi / Sijil sekiranya Nilai Akaun dari Akaun Perlindungan tidak mencukupi untuk membayar semua Caj-caj Polisi / Sijil.

Note / Nota:

*If the above option is not ticked, Account Value from Savings Account will not be deducted for the payment of Policy / Certificate Charges. / Jika pilihan di atas tidak ditandakan, Nilai Akaun dari Akaun Simpanan tidak akan ditolak bagi pembayaran Caj-cai Polisi / Sijil.*

## SECTION 2 / SEKSYEN 2 - CUSTOMER DUE DILIGENCE FORM (FOR INDIVIDUAL ONLY)

### BORANG USAHA WAJAR PELANGGAN (UNTUK PERSEORANGAN SAHAJA)

Agent Code / Kod Ejen

Agency Code / Kod Agensi

Agent Tel No. / No. Tel Ejen

Policy / Certificate Number

Nombor Polisi / Sijil

Name of Insured / Person Covered

Nama Insured / Orang Dilindungi

Insured / Person Covered NRIC No. (For Malaysian Citizen Only) / Passport No. (For Non-Malaysian Citizen Only)

No. KP (Untuk Warganegara Malaysia Sahaja) / No. Pasport (Untuk Bukan Warganegara Malaysia Sahaja) Insured / Orang Dilindungi

Please complete the relevant fields if there has been any changes to the information since your last update OR if you have NOT provided the information to us previously. You may login to AIA+ to view the current information in our records. / Sila lengkapkan ruangan berkaitan sekiranya terdapat perubahan maklumat semenjak kemas kini terakhir anda ATAU sekiranya anda TIDAK pernah memberikan maklumat tersebut kepada kami sebelum ini. Anda boleh log masuk ke AIA+ untuk menyemak maklumat semasa anda yang terdapat dalam rekod kami.

I have submitted a copy of NRIC (for Malaysian citizen only) or Passport (for Non-Malaysian citizen only) / Saya telah menghantar salinan Kad Pengenalan (untuk warganegara Malaysia sahaja) atau Pasport (untuk bukan warganegara Malaysia sahaja)

Policy / Certificate Owner

Pemilik Polisi / Sijil

☐

Yes

Ya

☐

No (please submit copy of NRIC / Passport)

Tidak (sila hantar salinan KP / Pasport)

\* Name / Nama

Payor / Contributor

Pembayar / Pencarum

☐

Yes

Ya

☐

No (please submit copy of NRIC / Passport)

Tidak (sila hantar salinan KP / Pasport)

\* Name / Nama

| Details / Butir-butir                                                                                                                                                                                             | Policy / Certificate Owner Details<br>Butir-butir Pemilik Polisi / Sijil                                                                                                                                       | Payor / Contributor Details<br>Butir-butir Pembayar / Pencarum                                                                                                                                                 |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>* NRIC No.</b> (For Malaysian citizen only) /<br><b>Passport No.</b> (For Non-Malaysian citizen only)<br>No. KP (Untuk warganegara Malaysia sahaja) /<br>No. Pasport (Untuk bukan warganegara Malaysia sahaja) |                                                                                                                                                                                                                |                                                                                                                                                                                                                |
| <b>Passport Expiry Date</b> (DD/MMM/YYYY)<br>Tarikh Luput Pasport (HH/BBB/TTTT)<br>Example / Contoh 01 JAN 2024                                                                                                   | <input type="text"/><br>DD / HH MMM / BBB YYYY / TTTT                                                                                                                                                          | <input type="text"/><br>DD / HH MMM / BBB YYYY / TTTT                                                                                                                                                          |
| <b>* Date of Birth</b> (DD/MMM/YYYY)<br>Tarikh Lahir (HH/BBB/TTTT)                                                                                                                                                | <input type="text"/><br>DD / HH MMM / BBB YYYY / TTTT                                                                                                                                                          | <input type="text"/><br>DD / HH MMM / BBB YYYY / TTTT                                                                                                                                                          |
| <b>Gender / Jantina</b>                                                                                                                                                                                           | <input type="checkbox"/> <b>Male</b><br>Lelaki <input type="checkbox"/> <b>Female</b><br>Perempuan                                                                                                             | <input type="checkbox"/> <b>Male</b><br>Lelaki <input type="checkbox"/> <b>Female</b><br>Perempuan                                                                                                             |
| <b>Race / Bangsa</b>                                                                                                                                                                                              | <input type="checkbox"/> <b>Malay</b><br>Melayu <input type="checkbox"/> <b>Chinese</b><br>Cina <input type="checkbox"/> <b>Indian</b><br>India <input type="checkbox"/> <b>Other</b><br>Lain-lain             | <input type="checkbox"/> <b>Malay</b><br>Melayu <input type="checkbox"/> <b>Chinese</b><br>Cina <input type="checkbox"/> <b>Indian</b><br>India <input type="checkbox"/> <b>Other</b><br>Lain-lain             |
| <b>Marital Status / Taraf Perkahwinan</b>                                                                                                                                                                         | <input type="checkbox"/> <b>Single</b><br>Bujang <input type="checkbox"/> <b>Married</b><br>Berkahwin <input type="checkbox"/> <b>Widow</b><br>Balu / Duda <input type="checkbox"/> <b>Divorce</b><br>Bercerai | <input type="checkbox"/> <b>Single</b><br>Bujang <input type="checkbox"/> <b>Married</b><br>Berkahwin <input type="checkbox"/> <b>Widow</b><br>Balu / Duda <input type="checkbox"/> <b>Divorce</b><br>Bercerai |
| <b>* Nationality / Warganegara</b>                                                                                                                                                                                |                                                                                                                                                                                                                |                                                                                                                                                                                                                |

\*Mandatory to fill / Wajib diisi

| Details / Butir-butir                                                                                                                                                                                            | Policy / Certificate Owner Details<br>Butir-butir Pemilik Polisi / Sijil                                                                                                                                                           | Payor / Contributor Details<br>Butir-butir Pembayar / Pencarum                                                                                                                                                                           |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| (a) Do you have any permanent resident status in other countries? / Adakah anda mempunyai taraf mastautin tetap di negara lain?                                                                                  | <input type="checkbox"/> Yes<br>Ya                                                                                                                                                                                                 | <input type="checkbox"/> No<br>Tidak                                                                                                                                                                                                     |
| (b) If YES, please state the country permanent residence / Jika YA, sila nyatakan negara taraf mastautin tetap                                                                                                   |                                                                                                                                                                                                                                    |                                                                                                                                                                                                                                          |
| * Name of Employer / Nama Majikan                                                                                                                                                                                |                                                                                                                                                                                                                                    |                                                                                                                                                                                                                                          |
| Nature of Business / Jenis Perniagaan                                                                                                                                                                            |                                                                                                                                                                                                                                    |                                                                                                                                                                                                                                          |
| Policy / Certificate Owner / Pemilik Polisi / Sijil                                                                                                                                                              | Payor / Contributor / Pembayar / Pencarum                                                                                                                                                                                          |                                                                                                                                                                                                                                          |
|                                                                                                                                                                                                                  |                                                                                                                                                                                                                                    |                                                                                                                                                                                                                                          |
| *Occupation / Pekerjaan                                                                                                                                                                                          |                                                                                                                                                                                                                                    |                                                                                                                                                                                                                                          |
| Policy / Certificate Owner / Pemilik Polisi / Sijil                                                                                                                                                              | Payor / Contributor / Pembayar / Pencarum                                                                                                                                                                                          |                                                                                                                                                                                                                                          |
|                                                                                                                                                                                                                  |                                                                                                                                                                                                                                    |                                                                                                                                                                                                                                          |
| * Annual Earned Income (RM)<br>Pendapatan Tahunan (RM)                                                                                                                                                           | <input type="checkbox"/> <36,000<br><input type="checkbox"/> 36,000 - 60,000<br><input type="checkbox"/> 60,001 - 75,000<br><input type="checkbox"/> 75,001 - 100,000<br><input type="checkbox"/> To specify / Sila nyatakan _____ | <input type="checkbox"/> 100,001 - 150,000<br><input type="checkbox"/> 150,001 - 200,000<br><input type="checkbox"/> 200,001 - 250,000<br><input type="checkbox"/> >250,000<br><input type="checkbox"/> To specify / Sila nyatakan _____ |
| * E-mail Address / Alamat E-mel                                                                                                                                                                                  |                                                                                                                                                                                                                                    |                                                                                                                                                                                                                                          |
| Telephone No. / No. Telefon                                                                                                                                                                                      |                                                                                                                                                                                                                                    |                                                                                                                                                                                                                                          |
| * Mobile / Tel. Bimbit                                                                                                                                                                                           |                                                                                                                                                                                                                                    |                                                                                                                                                                                                                                          |
| Residence / Rumah                                                                                                                                                                                                |                                                                                                                                                                                                                                    |                                                                                                                                                                                                                                          |
| Office Pejabat                                                                                                                                                                                                   |                                                                                                                                                                                                                                    |                                                                                                                                                                                                                                          |
| * Correspondence Address / Alamat Surat-menyurat<br>(A correspondence address is where you send and receive all mail items) / (Alamat surat - menyurat ialah tempat anda menghantar dan menerima semua item mel) |                                                                                                                                                                                                                                    |                                                                                                                                                                                                                                          |
| * Address Line 1 / Alamat 1                                                                                                                                                                                      |                                                                                                                                                                                                                                    |                                                                                                                                                                                                                                          |
| * Address Line 2 / Alamat 2                                                                                                                                                                                      |                                                                                                                                                                                                                                    |                                                                                                                                                                                                                                          |
| Address Line 3 / Alamat 3                                                                                                                                                                                        |                                                                                                                                                                                                                                    |                                                                                                                                                                                                                                          |
| * Postcode / Poskod                                                                                                                                                                                              |                                                                                                                                                                                                                                    |                                                                                                                                                                                                                                          |
| * State / Negeri                                                                                                                                                                                                 |                                                                                                                                                                                                                                    |                                                                                                                                                                                                                                          |
| * Country / Negara                                                                                                                                                                                               |                                                                                                                                                                                                                                    |                                                                                                                                                                                                                                          |
| Is your Residential Address same with your Correspondence Address?<br>Adakah Alamat Kediaman anda sama dengan Alamat surat-menyurat anda?                                                                        | <input type="checkbox"/> Yes<br>Ya                                                                                                                                                                                                 | <input type="checkbox"/> No (I will fill in the Residential Address section below)<br>Tidak (Saya akan isi alamat kediaman di bahagian bawah)                                                                                            |
|                                                                                                                                                                                                                  |                                                                                                                                                                                                                                    | <input type="checkbox"/> Yes<br>Ya                                                                                                                                                                                                       |
|                                                                                                                                                                                                                  |                                                                                                                                                                                                                                    | <input type="checkbox"/> No (I will fill in the Residential Address section below)<br>Tidak (Saya akan isi alamat kediaman di bahagian bawah)                                                                                            |
| * Residential Address / Alamat Kediaman<br>(A Residential address is the address at which you presently or normally resides) / (Alamat kediaman ialah alamat tempat tinggal anda sekarang)                       |                                                                                                                                                                                                                                    |                                                                                                                                                                                                                                          |
| * Address Line 1 / Alamat 1                                                                                                                                                                                      |                                                                                                                                                                                                                                    |                                                                                                                                                                                                                                          |
| * Address Line 2 / Alamat 2                                                                                                                                                                                      |                                                                                                                                                                                                                                    |                                                                                                                                                                                                                                          |
| Address Line 3 / Alamat 3                                                                                                                                                                                        |                                                                                                                                                                                                                                    |                                                                                                                                                                                                                                          |
| * Postcode / Poskod                                                                                                                                                                                              |                                                                                                                                                                                                                                    |                                                                                                                                                                                                                                          |
| * State / Negeri                                                                                                                                                                                                 |                                                                                                                                                                                                                                    |                                                                                                                                                                                                                                          |
| * Country / Negara                                                                                                                                                                                               |                                                                                                                                                                                                                                    |                                                                                                                                                                                                                                          |

| Details / Butir-butir                                                                                                                                                                                                       | Policy / Certificate Owner Details<br>Butir-butir Pemilik Polisi / Sijil                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | Payor / Contributor Details<br>Butir-butir Pembayar / Pencarum                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p><b>* Relationship Payor / Contributor with Owner</b><br/>Hubungan Pembayar / Pencarum dengan Pemilik</p>                                                                                                                 | <p><input type="checkbox"/> <b>Owner is also Payor / Contributor</b><br/>Pemilik juga Pembayar / Pencarum</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 | <p> <input type="checkbox"/> <b>Spouse</b>      <input type="checkbox"/> <b>Parent</b><br/> <i>Suami / isteri</i>      <i>Ibu / bapa</i> </p> <p> <input type="checkbox"/> <b>Siblings</b>      <input type="checkbox"/> <b>Sibling of Parent</b><br/> <i>Adik-beradik</i>      <i>Adik-beradik Ibu / bapa</i> </p> <p> <input type="checkbox"/> <b>Children</b>      <input type="checkbox"/> <b>Legal Guardian</b><br/> <i>Anak</i>      <i>Penjaga Sah</i> </p> <p> <input type="checkbox"/> <b>Grandparent</b>      <input type="checkbox"/> <b>Grandchild</b><br/> <i>Datuk / nenek</i>      <i>Cucu</i> </p> <p> <input type="checkbox"/> <b>Employer / Employee</b><br/> <i>Majikan / Pekerja</i> </p>                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| <p><b>* What is the source of fund that is being used to pay the premium / contribution / transaction?</b><br/>Apakah sumber dana yang digunakan untuk bayaran premium/ caruman / transaksi tersebut?</p>                   | <p> <input type="checkbox"/> <b>Salary / Business income</b><br/> <i>Gaji / Pendapatan perniagaan</i> </p> <p> <input type="checkbox"/> <b>Personal savings</b><br/> <i>Simpanan peribadi</i> </p> <p> <input type="checkbox"/> <b>Inheritance</b><br/> <i>Warisan</i> </p> <p> <input type="checkbox"/> <b>Sales of asset</b><br/> <i>Jualan aset</i> </p> <p> <input type="checkbox"/> <b>Sales of investments (shares, bonds, unit trusts etc.)</b><br/> <i>Jualan pelaburan (saham, bon, unit amanah dll)</i> </p> <p> <input type="checkbox"/> <b>Benefit from insurance policy / takaful certificate</b><br/> <i>Faedah daripada policy insurans / sijil takaf</i> </p> <p> <input type="checkbox"/> <b>Rental income</b><br/> <i>Pendapatan sewaan</i> </p> <p> <input type="checkbox"/> <b>Others, please specify / Lain-lain, sila nyatakan</b> _____         </p>                                                                                                                                                                                                                                                                   | <p> <input type="checkbox"/> <b>Salary / Business income</b><br/> <i>Gaji / Pendapatan perniagaan</i> </p> <p> <input type="checkbox"/> <b>Personal savings</b><br/> <i>Simpanan peribadi</i> </p> <p> <input type="checkbox"/> <b>Inheritance</b><br/> <i>Warisan</i> </p> <p> <input type="checkbox"/> <b>Sales of asset</b><br/> <i>Jualan aset</i> </p> <p> <input type="checkbox"/> <b>Sales of investments (shares, bonds, unit trusts etc.)</b><br/> <i>Jualan pelaburan (saham, bon, unit amanah dll)</i> </p> <p> <input type="checkbox"/> <b>Benefit from insurance policy / takaful certificate</b><br/> <i>Faedah daripada policy insurans / sijil takaf</i> </p> <p> <input type="checkbox"/> <b>Rental income</b><br/> <i>Pendapatan sewaan</i> </p> <p> <input type="checkbox"/> <b>Others, please specify / Lain-lain, sila nyatakan</b> _____         </p>                                                                                                                                                                                                                                                                   |
| <p><b>* What is the source of wealth of the party that is paying the premium / contribution / transaction?</b><br/>Apakah sumber kekayaan bagi pihak yang membuat bayaran untuk premium / caruman / transaksi tersebut?</p> | <p> <input type="checkbox"/> <b>Salary or commission from current and/or past employment</b> <i>Gaji atau komisen daripada pekerjaan semasa dan/atau lampau</i> </p> <p> <input type="checkbox"/> <b>Saving from past employment or Business</b><br/> <i>Simpanan dari pekerjaan atau perniagaan lampau</i> </p> <p> <input type="checkbox"/> <b>Sales of investments (shares, bonds, unit trusts etc.)</b><br/> <i>Jualan pelaburan (saham, bon, unit amanah dll)</i> </p> <p> <input type="checkbox"/> <b>Benefit from insurance policy / takaful certificate</b><br/> <i>Faedah daripada polisi insurans / sijil takaful</i> </p> <p> <input type="checkbox"/> <b>Business or trade income</b><br/> <i>Faedah daripada polisi insurans / sijil takaful</i> </p> <p> <input type="checkbox"/> <b>Sales of asset</b><br/> <i>Jualan aset</i> </p> <p> <input type="checkbox"/> <b>Inheritance or gift</b><br/> <i>Warisan atau hadiah</i> </p> <p> <input type="checkbox"/> <b>Rental income</b><br/> <i>Pendapatan sewaan</i> </p> <p> <input type="checkbox"/> <b>Others, please specify / Lain-lain, sila nyatakan</b> _____         </p> | <p> <input type="checkbox"/> <b>Salary or commission from current and/or past employment</b> <i>Gaji atau komisen daripada pekerjaan semasa dan/atau lampau</i> </p> <p> <input type="checkbox"/> <b>Saving from past employment or Business</b><br/> <i>Simpanan dari pekerjaan atau perniagaan lampau</i> </p> <p> <input type="checkbox"/> <b>Sales of investments (shares, bonds, unit trusts etc.)</b><br/> <i>Jualan pelaburan (saham, bon, unit amanah dll)</i> </p> <p> <input type="checkbox"/> <b>Benefit from insurance policy / takaful certificate</b><br/> <i>Faedah daripada polisi insurans / sijil takaful</i> </p> <p> <input type="checkbox"/> <b>Business or trade income</b><br/> <i>Faedah daripada polisi insurans / sijil takaful</i> </p> <p> <input type="checkbox"/> <b>Sales of asset</b><br/> <i>Jualan aset</i> </p> <p> <input type="checkbox"/> <b>Inheritance or gift</b><br/> <i>Warisan atau hadiah</i> </p> <p> <input type="checkbox"/> <b>Rental income</b><br/> <i>Pendapatan sewaan</i> </p> <p> <input type="checkbox"/> <b>Others, please specify / Lain-lain, sila nyatakan</b> _____         </p> |

\* Mandatory to fill / Wajib diisi

## IMPORTANT NOTICE / NOTA PENTING

1. If the policy has been taken out under Section 23 of the Civil Law Act 1956 or Schedule 10 Paragraph 5 of the Financial Services Act 2013, the appointed Trustees should also sign this form. / *Sekiranya polisi ini telah dikeluarkan di bawah Seksyen 23 Akta Undang-Undang Sivil 1956 atau Jadual 10 Perenggan 5 Akta Perkhidmatan Kewangan 2013, Pemegang Amanah yang dilantik turut dikehendaki untuk menandatangani borang ini.*
2. You have to evaluate the level of risk of the underlying fund(s) yourselves and select the underlying fund(s) based on your judgement & personal needs. *Anda hendaklah menilai tahap risiko dana asas dan memilih dana asas berdasarkan penilaian dan keperluan peribadi anda.*
3. The form must be received by AIA before 3.00 pm for the same day processing. / *Borang mesti diterima oleh AIA sebelum 3.00 petang untuk diproses pada hari yang sama.*
4. Withdrawal / *Pengeluaran*  
The minimum withdrawal amount is RM1,000 and the minimum amount to remain in the account is as below. / *Amaun pengeluaran minimum adalah RM1,000 dan amaun minimum hendaklah dikekalkan dalam dana seperti di bawah*

| Type of Plan / <i>Jenis Pelan</i>                                                                                                                                                                                                                                                                                                                                | Minimum Amount To Remain In Account<br><i>Amaun Minimum Untuk Dikekalkan Dalam Dana (RM)</i> |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------|
| <b>Regular Premium / Contribution Plan - for Conventional policy and Takaful certificate</b><br><i>Pelan Premium / Caruman Berkala - untuk polisi Konvensional dan Sijil Takaful</i>                                                                                                                                                                             | 1,000                                                                                        |
| <b>Single Premium Plan - for Conventional policy</b><br><i>Pelan Premium Tunggal - untuk polisi Konvensional</i>                                                                                                                                                                                                                                                 | 4,000                                                                                        |
| <b>Single Contribution Plan - for Takaful certificate</b><br><i>Pelan Caruman Tunggal - untuk Sijil Takaful</i>                                                                                                                                                                                                                                                  | 5,000                                                                                        |
| <b>A-Life Signature, A-Life Signature Plus One, A-Life Signature Beyond, PB WealthElite, PB WealthPlus - whichever applicable to Conventional policy and Takaful certificate</b><br><i>A-Life Signature, A-Life Signature Plus One, A-Life Signature Beyond, PB WealthElite, PB WealthPlus - yang mana berkenaan untuk polisi Konvensional dan Sijil Takaful</i> | 10,000                                                                                       |
| <b>A-Life Infinite - for Conventional policy</b><br><i>A-Life Infinite - untuk polisi Konvensional</i>                                                                                                                                                                                                                                                           | 50,000                                                                                       |

Minimum withdrawal amount for A-Life Legasi, A-Life Legasi Builder and A-Life Legasi Beyond is RM1,000 and the minimum Account Value to remain in PAF after withdrawal is RM10,000. Any withdrawal will first utilise the Account Value in PIF then only followed by Account Value in PAF. The Basic Sum Covered will be reduced if the Account Value in PAF is used for Partial Withdrawal. / *Amaun pengeluaran minimum untuk A-Life Legasi, A-Life Legasi Builder dan A-Life Legasi Beyond ialah RM1,000 dan Nilai Akaun minimum untuk kekal dalam PAF selepas pengeluaran ialah RM10,000. Sebarang pengeluaran akan menggunakan Nilai Akaun dalam PIF terlebih dahulu kemudian diikuti dengan Nilai Akaun dalam PAF. Jumlah Asas Dilindungi akan dikurangkan jika Nilai Akaun dalam PAF digunakan untuk Pengeluaran Separa.*

This value may be revised by AIA from time to time. If the withdrawal amount requested by you contradicts the above, your withdrawal amount will be adjusted so that the said minimum is maintained. If your adjusted withdrawal amount is less than the current requirement of RM1,000 as per your contract provision, the transaction will not be processed. / *Nilai ini boleh disemak semula oleh AIA dari semasa ke semasa. Jika amaun pengeluaran yang anda mohon bercanggah dengan di atas, amaun pengeluaran anda akan diselaraskan supaya nilai minimum tersebut boleh dikekalkan. Jika amaun diselaraskan kurang daripada syarat semasa RM1,000 seperti yang ditetapkan dalam peruntukan kontrak anda, transaksi tersebut tidak akan diproses.*

5. Ad Hoc Top-up / Scheduled Top-up / Change Of Investment Allocation  
*Premium / Caruman Tokok Ad Hoc / Premium / Caruman Tokok Berjadual / Perubahan Peruntukan Pelaburan*
  - i. If the new investment allocation is not stated in the table, your new investment will follow the current investment allocation. / *Jika peruntukan pelaburan dana baharu tidak dinyatakan di dalam jadual, pelaburan baharu anda akan mengikut peruntukan pelaburan semasa anda.*
  - ii. Minimum Ad Hoc Top Up = RM500 for regular premium / contribution plans & single premium / contribution plan except below  
*Minimum Premium / Caruman Tokok Ad Hoc = RM500 untuk pelan premium / caruman berkala & pelan premium / caruman tunggal kecuali yang di bawah*

| Type of Plan / Jenis Pelan                                                                                                                                                                  | Minimum Ad Hoc Top Up Amount<br>Amaun Tambah Nilai Ad Hoc Minimum (RM) |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------|
| <b>A-Life Signature, A-Life Signature PlusOne, A-Life Signature Beyond, A-Life Legasi, A-Life Legasi Builder, A-Life Legasi Beyond, PB WealthElite, PB WealthPlus &amp; A-Life Infinite</b> | <b>5,000</b>                                                           |
| <b>AIA Capital Builder series</b><br><i>Siri AIA Capital Builder</i>                                                                                                                        | <b>1,000</b>                                                           |

- iii. AIA Strategic Equity Fund and AIA Strategic Fixed Income Fund only applicable for A-LifeLink 2, A-Life Joy 2, A-Life Wealth Care, A-InvestLink, A-Enrich Wealth, Empower 2, Empower Edu 2, PB WealthElite 3, PB Smart Link and PB Max Advantage. *AIA Strategic Equity Fund dan AIA Strategic Fixed Income Fund hanya berkenaan bagi A-LifeLink 2, A-Life Joy 2, A-Life Wealth Care, A-InvestLink, A-Enrich Wealth, Empower 2, Empower Edu 2, PB WealthElite 3, PB Smart Link dan PB Max Advantage.*
- iv. You can only apply to invest for each future renewal premium / contribution in not more than 10 Funds at any one time. / *Anda hanya boleh memohon untuk melabur bagi setiap premium / caruman pembaharuan masa depan tidak melebihi daripada 10 Dana pada satu-satu masa.*
- v. To increase the regular premium / contribution, please complete the Policy / Certificate Alteration Form. / *Untuk menambah premium / caruman berkala, sila lengkapkan Borang Perubahan Polisi / Sijil.*
6. Fund Switching / *Pertukaran Dana*
- i. You can only apply to switch out your units in a Fund to a maximum of 10 new Funds at any one time. / *Anda hanya boleh memohon untuk pertukaran unit Dana anda kepada maksimum 10 Dana baharu pada satu-satu masa.*
- ii. AIA Strategic Equity Fund and AIA Strategic Fixed Income Fund only applicable for A-LifeLink 2, A-Life Joy 2, A-Life Wealth Care, A-InvestLink, A-Enrich Wealth, Empower 2, Empower Edu 2, PB WealthElite 3, PB Smart Link and PB Max Advantage. / *AIA Strategic Equity Fund dan AIA Strategic Fixed Income Fund hanya berkenaan bagi A-LifeLink 2, A-Life Joy 2, A-Life Wealth Care, A-InvestLink, A-Enrich Wealth, Empower 2, Empower Edu 2, PB WealthElite 3, PB Smart Link dan PB Max Advantage.*
- iii. Funds will be switched on a bid-to-bid basis. No fund switching fee. / *Dana akan ditukar atas dasar bida-ke-bida. Tiada yuran dikenakan bagi pertukaran dana.*
7. Bank Account Information / *Maklumat Akaun Bank*
- i. To make sure you receive your payment as quickly as possible, we will pay directly to your bank account. Please fill out the section and ensure all information is complete and accurate to avoid delays in payment. / *Untuk memastikan anda menerima bayaran secepat mungkin, kami akan membayar terus ke akaun bank anda. Sila isi ruangan ini dan pastikan semua maklumat lengkap dan tepat untuk mengelakkan kelewatan pembayaran.*
- ii. For trustees appointed under Section 23 of the Civil Law Act 1956, a joint account under the names of the trustees must be provided, otherwise AIA will pay to the trustees by cheques in equal shares. / *Untuk Pemegang Amanah yang dilantik di bawah Seksyen 23 Akta Undang-Undang Sivil 1956, akaun bersama di bawah nama Pemegang Amanah mesti diberikan, jika tidak AIA akan membayar kepada Pemegang Amanah melalui cek, dalam bahagian yang sama.*

## DECLARATION AND AUTHORISATION / PENGISYTIHARAAN DAN PEMBERIKUASAAN

I / We confirm that the information given are true and accurate. / Saya / Kami mengesahkan bahawa maklumat yang diberikan adalah benar dan tepat.

I / We understand that AIA relies on the information given by me / us and I / we agree to indemnify AIA if it suffers any losses arising from this authorisation. Saya / Kami faham bahawa AIA bergantung kepada maklumat yang diberikan oleh saya / kami dan saya / kami bersetuju untuk menanggung kerugian AIA sekiranya AIA mengalami kerugian disebabkan kebenaran yang diberikan ini.

I / We understand and agree that any personal information collected or held by AIA (whether contained in this application or otherwise obtained, including through credit reporting agencies) may be held, used, and disclosed by AIA to individuals / organizations related to and associated with AIA or any selected third party (within or outside of Malaysia, including but not limited to reinsurance companies / retakaful operators, claims investigation companies and industry associations / federations) for the purpose of (a) processing this application; (b) providing subsequent service for this; (c) for AIA data matching; and (d) to review and advice on my / our coverage with AIA. I / We understand that I / we have a right to obtain access to and to request correction of any personal information held by AIA concerning me / us. Such request can be made to any of AIA's Customer Centre. / Saya / Kami faham dan bersetuju bahawa sebarang maklumat peribadi yang dikumpulkan atau dipegang oleh AIA (sama ada yang terkandung dalam permohonan ini atau diperolehi dengan cara lain, termasuk melalui agensi pelaporan kredit) boleh dipegang, digunakan dan didedahkan oleh AIA kepada individu / organisasi yang berhubung dan berkaitan dengan AIA atau mana-mana pihak ketiga yang dipilih (di dalam atau di luar Malaysia, termasuk tetapi tidak terhad kepada syarikat insurans semula / pengedali takaful semula dan syarikat penyiasatan tuntutan dan persatuan industri / persekutuan) bagi tujuan (a) memproses permohonan ini (b) memberikan khidmat seterusnya (c) untuk pepadanan data AIA; dan (d) menyemak dan memberi nasihat mengenai perlindungan saya / kami dengan AIA. Saya / Kami faham bahawa saya / kami berhak memperoleh akses kepada, dan memohon pembetulan sebarang maklumat peribadi yang dipegang oleh AIA berkaitan dengan saya / kami. Permohonan seperti itu boleh dibuat di mana-mana Pusat Pelanggan AIA.

I / We understand and agree that any changes made to the personal details of individual or company via this application, amendment form or any other related documents will be applied to the current policy / certificate and ALL policies / certificates under the same NRIC / Passport / Registration No. within submitted entity's system. / Saya / Kami faham dan bersetuju bahawa sebarang perubahan yang dibuat kepada butiran peribadi individu atau syarikat melalui permohonan ini, borang pindaan atau mana-mana dokumen lain yang berkaitan akan diguna pakai bagi polisi / sijil semasa dan SEMUA polisi / sijil di bawah Nombor Kad Pengenalan / Pasport / Pendaftaran yang sama dalam sistem entiti permohonan.

### Important Note: / Nota Penting:

AIA is inclusive of AIA Bhd., AIA PUBLIC Takaful Bhd. and AIA General Berhad. / AIA termasuk AIA Bhd., AIA PUBLIC Takaful Bhd. dan AIA General Berhad.

AIA may review and / or update the Privacy Statement from time to time to reflect the changes in law and / or AIA internal policy. For more information on how AIA deals with personal information, please refer to the latest Privacy Statement on our website at [www.aia.com.my](http://www.aia.com.my). / AIA mungkin menyemak semula dan / atau mengemas kini Kenyataan Privasi dari semasa ke semasa berdasarkan perubahan dalam undang-undang dan / atau polisi dalaman AIA. Untuk maklumat lanjut mengenai cara AIA menguruskan maklumat peribadi, sila rujuk Kenyataan Privasi terbaharu di laman web kami di [www.aia.com.my](http://www.aia.com.my).

I / We authorise AIA to credit any payment due to me / us under the above policy / other policies or certificate / other certificates that I / We have with AIA to the above bank account or any bank account that is last updated in AIA's records. / Saya / Kami membenarkan AIA untuk mengkreditkan terus sebarang bayaran di bawah Polisi di atas / polisi-polisi lain atau Sijil di atas / sijil-sijil lain ke akaun bank di atas atau mana-mana akaun bank terakhir yang dikemaskini dalam rekod AIA.

☐ I hereby acknowledge that I have reviewed the Sustainability Quotation and understand the impact of the changes requested to the sustainability of my policy / certificate. / Saya dengan ini mengakui bahawa saya telah meneliti Sebut Harga Kemampanan dan memahami kesan daripada sebarang pertukaran yang diminta terhadap kemampanan polisi / sijil saya.

**Only applicable for investment-linked policies / certificates and Universal Life policies.** AIA is not able to process your request for change if this declaration is not selected. However, this is not applicable to Part B, Item 1 - Ad Hoc Top-Up Premium / Contribution. For Ad Hoc Top-Up Premium / Contribution request, please login to AIA+ App to check on the sustainability information of your policy / certificate. Alternatively, you may also refer to annual financial statement for information on the sustainability of your policy / certificate. / Hanya berkenaan bagi polisi / sijil berkaitan pelaburan dan Universal Life sahaja. AIA tidak dapat memproses permintaan pertukaran anda sekiranya perakuan ini tidak dipilih. Bagaimanapun, ini tidak berkenaan bagi Bahagian B, Item 1 - Premium / Caruman Tokok Ad Hoc. Untuk Premium / Caruman Tokok Ad Hoc, sila log masuk ke AIA+ App untuk menyemak kemampanan polisi / sijil anda. Sebagai alternatif, anda juga boleh merujuk kepada penyata kewangan tahunan untuk maklumat tentang kemampanan polisi / sijil anda.

Signed on

Ditandatangani pada

DD / HH MMM / BBB YYYY / TTTT

Signature of Policy / Certificate Owner / Assignee  
Tandatangan Pemilik Polisi / Sijil /  
Pemegang Serah Hak

Name / Nama

NRIC No. / Passport No. / No. KP / No. Pasport

Signature of Trustee (If any)  
Tandatangan Pemegang Amanah

Name / Nama

NRIC No. / Passport No. / No. KP / No. Pasport

Passport Expiry Date / Tarikh Luput Pasport

(DD/MMM/YYYY) / (HH/BBB/TTTT)

Mobile No. / No. Telefon Bimbit

Signature of Witness / Tandatangan Saksi

Name / Nama

NRIC No. / Passport No. / No. KP / No. Pasport

Passport Expiry Date / Tarikh Luput Pasport

(DD/MMM/YYYY) / (HH/BBB/TTTT)

Mobile No. / No. Telefon Bimbit