



Instruction Form for Investment - Linked Plans
Borang Arahan bagi Pelan Berkaitan Pelaburan

Collection Station
Stesen Kutipan

Barcode area with Policy Number / Nombor Polisi input field.

Agent Code / Kod Ejen, Agency Code / Kod Agensi, Dispatch Location / Lokasi Penghantaran, Agent Tel No. / No. Tel Ejen

Name of Insured / Nama Insured, NRIC No. / No. KP

IMPORTANT NOTE / 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.
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.
3. The form must be received by Company before 3.00 pm for the same day processing.

PART A Surrender of Account Value / Serahan Nilai Akaun

I understand that the surrender value or the account value of the policy, whichever is applicable, shall be according to its terms and conditions as stated in the policy contract, together with all dividends or additions of any nature, if any. I enclose herewith, the said policy for cancellation. Upon payment thereof, the liability of AIA Bhd. ("AIA") shall be and thereby completely discharged.

PART B Partial Withdrawal / Pengeluaran Separa (*Please delete where not applicable) / (*Sila potong yang tidak berkenaan)

Table with columns: Fund Name / Nama Dana, *Amount (RM) / Percentage % / *Amaun (RM) / Peratusan %

The minimum withdrawal amount is RM1000 and the minimum amount to remain in the account is RM1000 (for Regular Premium Plan), RM4000 (for Single Premium Plan), RM10,000 (for A-Life Signature / A-Life Signature PlusOne, A-Life Signature Beyond, PB WealthElite, PB WealthPlus) and RM50,000 (for A-Life Infinite).

PART C Automatic Fund Rebalancing / Pengimbangan Semula Dana Automatik

The frequency of Automatic Fund Rebalancing is quarterly
Kekerapan Pengimbangan Semula Dana Automatik ialah suku tahunan
1. To activate this option / Untuk mengaktifkan pilihan ini
Investment Allocation to follow / Mengikut Peruntukan Pelaburan
2. To terminate this option on / Untuk menamatkan pilihan ini

Table with columns: Fund Name / Nama Dana, Percentage %

(Please state percentage in multiple of 5%) / (Peruntukan mestilah dalam gandaan 5%)

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PART D | **Ad Hoc Top-Up / Scheduled Top-Up / Change of Investment Allocation**
Premium Tokok Ad Hoc / Premium Tokok Berjadual / Pertukaran Peruntukan Pelaburan

1. Ad Hoc Top-Up Premium
Premium Tokok Ad Hoc RM _____
 Investment Allocation to follow / Mengikut Peruntukan Pelaburan
 Current / Semasa
 New allocation as stated below / Peruntukan baru seperti yang dinyatakan di bawah
2. Scheduled Top-Up / A Saver Premium / A-Plus Saver Premium for Regular Premium / Premium Tokok Berjadual / Premium A Saver / Premium A-Plus Saver untuk Premium Tetap RM _____ per year / setahun
 Investment Allocation to this policy / Ikut Peruntukan Pelaburan polisi ini
 Current / Semasa
 Allocation as stated below / Peruntukan seperti yang dinyatakan di bawah
3. Scheduled Top-Up / A-Plus Saver Premium for Single Premium / Premium Tokok Berjadual / Premium A-Plus Saver untuk Premium Tunggal RM _____
 Annually / Tahunan
 Quarterly / Suku Tahunan
 Semi-Annually / Setengah Tahunan
 Monthly / Bulanan
 Investment Allocation to follow / Mengikut Peruntukan Pelaburan
 Current / Semasa
 New allocation as stated below / Peruntukan baru seperti yang dinyatakan di bawah
4. Change of Investment Allocation to follow Pertukaran Peruntukan Pelaburan mengikut
 New allocation as stated below / Peruntukan baru seperti yang dinyatakan di bawah

Fund Name / Nama Dana	Percentage % / Peratusan %		
	Regular Premium / Premium Tetap	Scheduled Top-Up / A Saver Premium / A-Plus Saver Premium / Premium Tokok Berjadual / Premium A Saver / Premium A-Plus Saver	Ad Hoc Top-Up / Premium Tokok Ad Hoc
1. AIA BALANCED FUND / DANA SEIMBANG AIA			
2. AIA EQUITY PLUS FUND / DANA EKUITI PLUS AIA			
3. AIA FIXED INCOME FUND / DANA PENDAPATAN TETAP AIA			
4. AIA DANA PROGRESIF / DANA PROGRESIF AIA			
5. AIA MEDIUM CAP FUND / DANA MODAL SEDERHANA AIA			
6. AIA AGGRESIVE FUND / DANA AGRESIF AIA			
7. AIA DANA DINAMIK / DANA DINAMIK AIA			
8. AIA NEW HORIZON FUND / DANA HORIZON BARU AIA			
9. AIA ASIA PLATINUM FUND / DANA ASIA PLATINUM AIA			
10. AIA INTERNATIONAL SMALL CAP FUND / DANA MODAL KECIL ANTARABANGSA AIA			
11. AIA ELEVEN PLUS FUND / DANA ELEVEN PLUS AIA			
12. AIA DANA BON / DANA BON AIA			
13. AIA ASIA OPPORTUNITY FUND / DANA ASIA OPPORTUNITY AIA			
14. AIA EQUITY DIVIDEND FUND / DANA DIVIDEN EKUITI AIA			
15. *AIA ASIAN DEBT FUND / *DANA ASIAN DEBT AIA			
16. *AIA ASIAN EQUITY FUND / *DANA EKUITI ASIA AIA			
17. *AIA INTERNATIONAL HIGH DIVIDEND FUND / *DANA DIVIDEN TINGGI ANTARABANGSA AIA			
18. AIA STRATEGIC EQUITY FUND / DANA EKUITI STRATEGIK AIA			
19. AIA STRATEGIC FIXED INCOME FUND / DANA PENDAPATAN TETAP STRATEGIK AIA			
20. OTHERS / LAIN-LAIN :			
TOTAL / JUMLAH	100%	100%	100%

Note / Nota:

- If the new investment allocation is not stated on the table, your new investment will follow the regular premium allocation. / Jika peruntukan pelaburan dana baru tidak dinyatakan di dalam jadual, pelaburan baru anda akan mengikut pelaburan premium tetap anda.
- Minimum Ad Hoc Top Up = RM500 for regular premium plans & single premium plan / RM5,000 for A-Life Signature, A-Life Signature PlusOne, A-Life Signature Beyond, PB WealthElite, PB WealthPlus & A-Life Infinite / RM1,000 for AIA Capital Builder series (Please state percentage in multiple of 5%). *The funds only applicable for Ex-ING policies and policies issued after 17 June 2013. / Minimum Premium Tokok Ad Hoc = RM500 untuk premium tetap dan pelan premium tunggal / RM5,000 A-Life Signature, A-Life Signature PlusOne, A-Life Signature Beyond, PB WealthElite, PB WealthPlus & A-Life Infinite / RM1,000 untuk siri AIA Capital Builder (Peruntukan mestilah dalam gandaan 5%). *Dana hanya terpakai untuk Ex-ING polisi dan polisi yang dikeluarkan selepas 17 Jun 2013.
- 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. Dana Ekuiti Strategik AIA dan Dana Pendapatan Tetap Strategik AIA hanya terhad kepada 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.
- You can only apply to invest for each future renewal premium in not more than 10 Funds at any one time. / Anda hanya boleh memohon untuk melabur bagi setiap premium pembaharuan masa depan tidak lebih daripada 10 Dana pada satu masa.

PART E | **Ad Hoc Fund Switching**
Pertukaran Dana Ad Hoc

Existing Fund / Dana Semasa		Target Fund / Dana Sasaran	
From / Daripada		To / Kepada	
Fund Name <i>Nama Dana</i>	*Amount/No. of Units/% <i>*Amaun/Bilangan Unit/%</i>	Fund Name <i>Nama Dana</i>	*Amount/% <i>*Amaun/%</i>

Note / Nota:

- Fund switching is not allowed for AIA Asian Debt Fund, AIA Asian Equity Fund and AIA International High Dividend Fund. / *Pertukaran Dana tidak dibenarkan bagi Dana Asian Debt AIA, Dana Asian Ekuiti AIA dan Dana Dividen Tinggi Antarabangsa AIA.*
- 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 penukaran unit-unit dana anda kepada maksimum 10 dana baru pada satu masa.*
- 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. *Dana Ekuiti Strategik AIA dan Dana Pendapatan Tetap Strategik AIA hanya terhad kepada 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.*

PART F | **Authorisation of Policy Charges Deduction from Savings Account (A Saver Premium/A-Plus Saver Premium)**
Kebenaran bagi Pemotongan Caj-caj Polisi dari Akaun Simpanan (Premium A Saver/Premium A-Plus Saver)

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

Note / Nota:

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

INFORMATION ON BANK ACCOUNT THIS PAYMENT WILL BE PAID TO / MAKLUMAT AKAUN BANK UNTUK PEMBAYARAN BAYARAN INI

IMPORTANT NOTICE / NOTIS PENTING

- To make sure you receive your payment as quickly as possible, we will pay directly to your bank account. Please fill out this section and ensure all information is complete and accurate to avoid delays in payment. / *Bagi memastikan anda menerima bayaran secepat mungkin, kami akan membayar terus ke akaun bank anda. Sila isi ruangan ini dan pastikan semua maklumat adalah lengkap dan tepat untuk mengelakkan kelewatan dalam pembayaran.*
- 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 Bhd. ("AIA") will pay to the trustees by cheques in equal shares. / *Bagi 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.*
- If this column is not completed, AIA will pay to the bank account that is last updated in AIA's records. / *Jika ruang ini tidak diisi, AIA akan membayar kepada akaun bank yang dikemas kini dalam rekod AIA.*
- You are responsible to notify AIA in writing immediately of any changes in your bank account number. The notice shall take effect on the date of receipt by AIA. / *Anda bertanggungjawab untuk memaklumkan kepada AIA secara bertulis dengan segera mengenai sebarang perubahan nombor akaun bank anda. Notis tersebut akan berkuat kuasa pada tarikh AIA menerima notis tersebut.*

Policy Owner's / Assignee's Name / <i>Nama Pemilik Polisi / Pemegang Serah Hak</i> (as appearing in bank account statement / <i>seperti yang tertera di penyata akaun bank</i>)																						
NRIC or Company Registration No. / <i>No. KP atau No. Pendaftaran Syarikat</i> (as appearing in bank account statement / <i>seperti yang tertera di penyata akaun bank</i>)																						
Bank Name / <i>Nama Bank</i>																						
Bank Account No. / <i>No. Akaun Bank</i>	<table border="1"> <tr> <td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td> </tr> </table>																					
E-mail Address / <i>Alamat E-mel</i>																						
Mobile No. / <i>No. Telefon Bimbit</i>																						

Declaration And Authorisation / Pengisytiharan Dan Pemberikuasaan

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

**Only applicable for investment-linked policies. AIA is not able to process your request for change if this declaration is not selected. / *Terhad untuk polisi berkaitan pelaburan sahaja. AIA tidak dapat memproses permintaan pertukaran anda sekiranya pengisytiharan ini tidak ditandakan.*

1. I/We confirm that the answers given are true and accurate. *I Saya/Kami mengesahkan bahawa jawapan yang diberikan adalah benar dan tepat.*
2. I understand that AIA relies on the information given by me and I agree to indemnify AIA if it suffers any losses arising from this authorisation. *I Saya faham bahawa AIA bergantung kepada maklumat yang diberikan oleh saya dan saya bersetuju untuk mengganti rugi AIA sekiranya AIA menanggung kerugian disebabkan oleh kebenaran ini.*
3. I/We understand and agree that any personal information collected or held by AIA Bhd. (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, 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. *I Saya/Kami faham dan bersetuju bahawa sebarang maklumat peribadi yang dikumpulkan atau dipegang oleh AIA Bhd. (sama ada terkandung dalam permohonan ini atau diperolehi dengan cara lain, termasuk melalui agensi pelaporan kredit) boleh dipegang, digunakan dan diberikan 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 reinsurans 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.*

Important Note: / Nota Penting:

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. *I AIA mungkin menyemak semula dan/atau mengemas kini Pernyataan Privasi dari masa 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 terbaru di laman web kami di www.aia.com.my.*

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

Executed on

Dikuatkuasakan pada

		-			-	2	0		
DD / HH			MM / BB			YYYY / TTTT			

Signature of Policy Owner / Assignee

Tandatangan Pemilik Polisi / Pemegang Serah Hak

Name / Nama

NRIC No. / No. KP

Signature of Trustee

Tandatangan Pemegang Amanah

Name / Nama

NRIC No. / No. KP

Signature of Witness

Tandatangan Saksi

Name / Nama

NRIC No. / No. KP

Mobile No. / No. Telefon Bimbit



Customer Due Diligence Form / Borang Usaha Wajar Pelanggan

This form is for the use of: / Borang ini adalah untuk kegunaan: **AIA Bhd.** (790895-D), **AIA PUBLIC Takaful Bhd.** (935955-M) and **AIA General Berhad** (924363-W)

Policy/Certificate Number / Nombor Polisi/Sijil <input type="text"/>								
i. POLICY/CERTIFICATE OWNER DETAILS / BUTIR-BUTIR PEMILIK POLISI/SIJIL All sections are required to be completed, where relevant. / Semua bahagian yang berkaitan, perlu dilengkapkan.								
Name Nama	NRIC No. (For Malaysian citizen only) No. KP (Untuk warganegara Malaysia sahaja)							
Date of Birth Tarikh Lahir	(DD/MM/YYYY) (HH/BB/TTTT)	Gender Jantina	<input type="checkbox"/> Male Lelaki	<input type="checkbox"/> Female Perempuan				
Passport No. (For Non-Malaysian citizen only) No. Pasport (Untuk bukan warganegara Malaysia sahaja)	Nationality Kewarganegaraan							
Name of Employer Nama Majikan	Nature of Business Jenis Perniagaan							
Occupation Pekerjaan	Exact Duties Tanggungjawab Sebenar							
Mobile No. No. Telefon Bimbit	E-mail Address (Optional) Alamat E-mel (Pilihan)							
Owner's Correspondence Address Alamat Surat-menyurat Pemilik								
If you are the Policy/Certificate Owner, are you also the Payor/Contributor of the policy/certificate? Sekiranya anda adalah Pemilik Polisi/Sijil, adakah anda juga Pembayar/Pencarum polisi/sijil yang berkenaan?								
<input type="checkbox"/> Yes Ya					<input type="checkbox"/> No. I will complete the Payor/Contributor information section below Tidak. Saya akan melengkapkan maklumat Pembayar/Pencarum di bahagian berikutnya			
ii. PAYOR/CONTRIBUTOR DETAILS / BUTIR-BUTIR PEMBAYAR/PENCARUM All sections are required to be completed, where relevant. / Semua bahagian yang berkaitan, perlu dilengkapkan.								
Name Nama	NRIC No. (For Malaysian citizen only) No. KP (Untuk warganegara Malaysia sahaja)							
Date of Birth Tarikh Lahir	(DD/MM/YYYY) (HH/BB/TTTT)	Gender Jantina	<input type="checkbox"/> Male Lelaki	<input type="checkbox"/> Female Perempuan				
Passport No. (For Non-Malaysian citizen only) No. Pasport (Untuk bukan warganegara Malaysia sahaja)	Nationality Kewarganegaraan							
Name of Employer Nama Majikan	Nature of Business Jenis Perniagaan							
Occupation Pekerjaan	Exact Duties Tanggungjawab Sebenar							
Mobile No. No. Telefon Bimbit	E-mail Address (Optional) Alamat E-mel (Pilihan)							
Payor's Correspondence Address Alamat Surat-menyurat Pembayar								

For Office Use
Untuk Kegunaan Pejabat

DECLARATION / PENGISYTIHARAN

I/We understand and agree that any personal information collected or held by AIA Bhd. / AIA PUBLIC Takaful Bhd. / AIA General Berhad (hereinafter referred to as "AIA") (whether contained in this form or otherwise obtained, including through credit reporting agencies) may be held, used, and disclosed by AIA to individuals/organisations related to and associated with AIA or any selected third party (within or outside of Malaysia, including but not limited to regulators/authorities, reinsurance companies/retakaful operators, claims investigation companies, industry associations/federations and credit reporting agencies) for the purpose of (a) processing this form; (b) providing subsequent service for this; (c) for AIA data matching; (d) to review and advice on my/our coverage with AIA; and (e) for regulatory and/or statutory compliance purposes. I/We understand that I/we have the 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 Service Centres. / Saya/Kami faham dan bersetuju bahawa sebarang maklumat peribadi yang dikumpulkan atau dipegang oleh AIA Bhd. / AIA PUBLIC Takaful Bhd. / AIA General Berhad (selepas ini dirujuk sebagai "AIA") (sama ada terkandung dalam borang ini atau diperolehi dengan cara lain, termasuk melalui agensi pelaporan kredit) boleh dipegang, digunakan, dan diberikan 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 pihak berkuasa, syarikat reinsurans/pengendali retakaful, syarikat penyiasatan tuntutan, persatuan/persekutuan industri dan agensi pelaporan kredit) bagi tujuan (a) memproses permohonan ini; (b) memberikan khidmat seterusnya; (c) untuk pemadanan data AIA; (d) menyemak dan memberi nasihat mengenai perlindungan saya/kami dengan AIA; dan (e) bagi tujuan pematuhann undang-undang dan/atau statutori. 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 Khidmat Pelanggan AIA.

Important Note: / Nota Penting:

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Executed on*Dikuatkuasakan pada*

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DD / HH			MM / BB			YYYY / TTTT			

Signature of Policy/Certificate Owner*Tandatangan Pemilik Polisi/Sijil***Name / Nama****NRIC/Passport No. / No. KP/Pasport****Signature of Payor/Contributor***Tandatangan Pembayar/Pencarum***Name / Nama****NRIC/Passport No. / No. KP/Pasport**