



HEALTHIER, LONGER,  
BETTER LIVES

# iPOS for PRS

## Step by Step Guide

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# iPOS for PRS

## Introducing iPOS for PRS



### Before iPOS...

- 🚗 Multiple trips to meet clients
- 📄 Endless forms to fill
- ✗ Rejections from incomplete applications



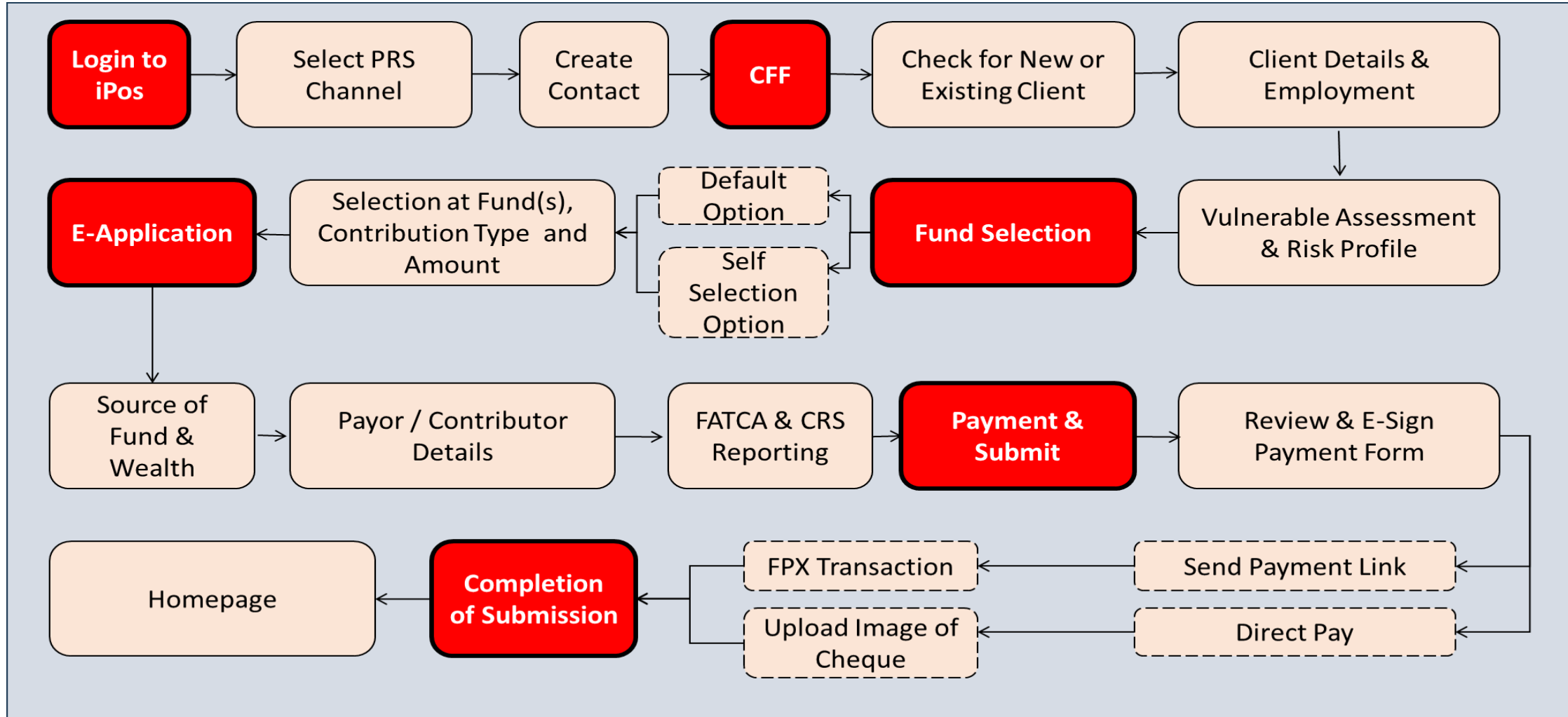
### Now with iPOS...

- ⚡ Submit PRS in just 15 minutes
- ✅ Smart checks for complete submissions
- 🏆 More time to close cases and grow your PRS and Cross Sell Business

# iPOS for PRS

## User Journey Process Flow

Client Fact Find (CFF) > Fund Selection > E-Application (EAPP) > Payment

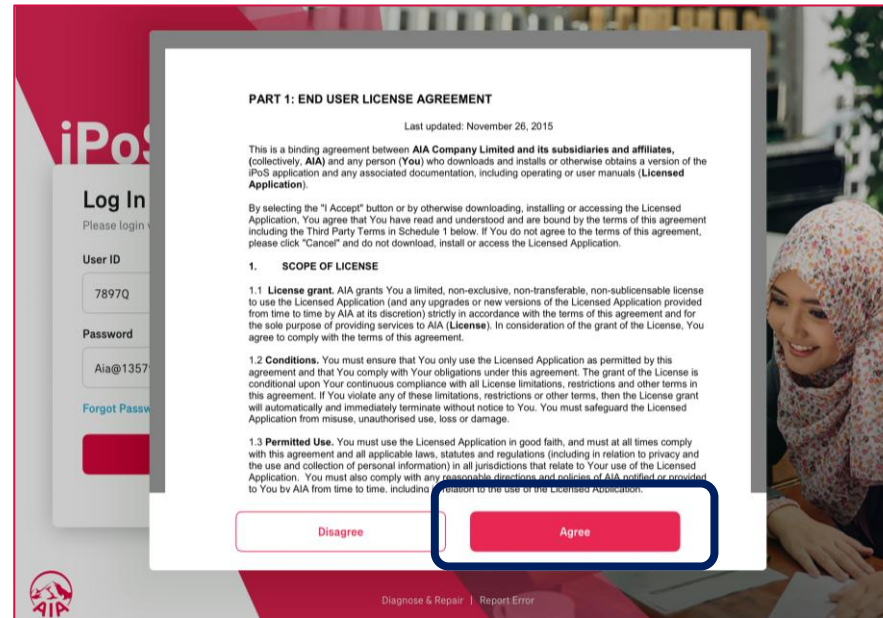
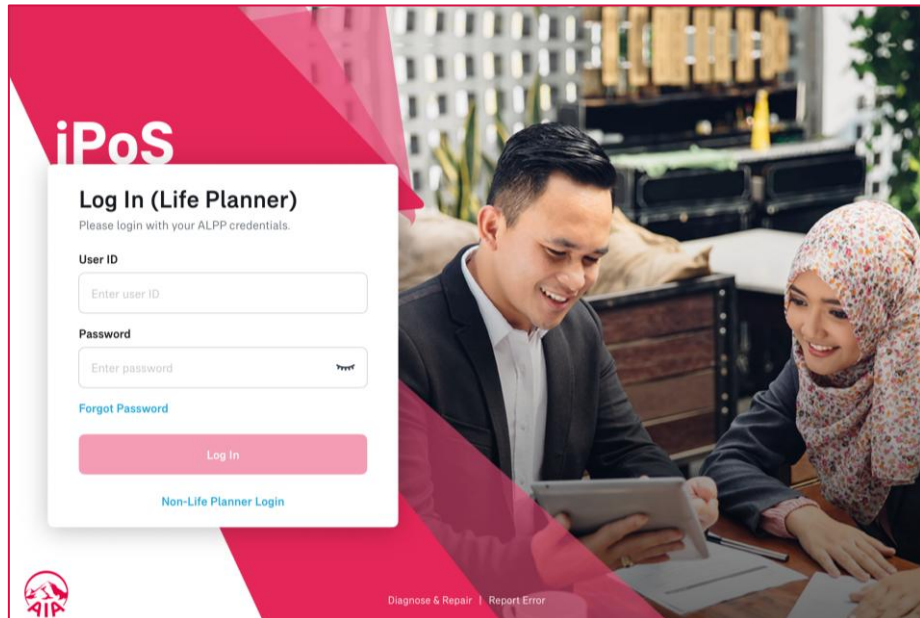


# iPOS for PRS - Overview of Steps

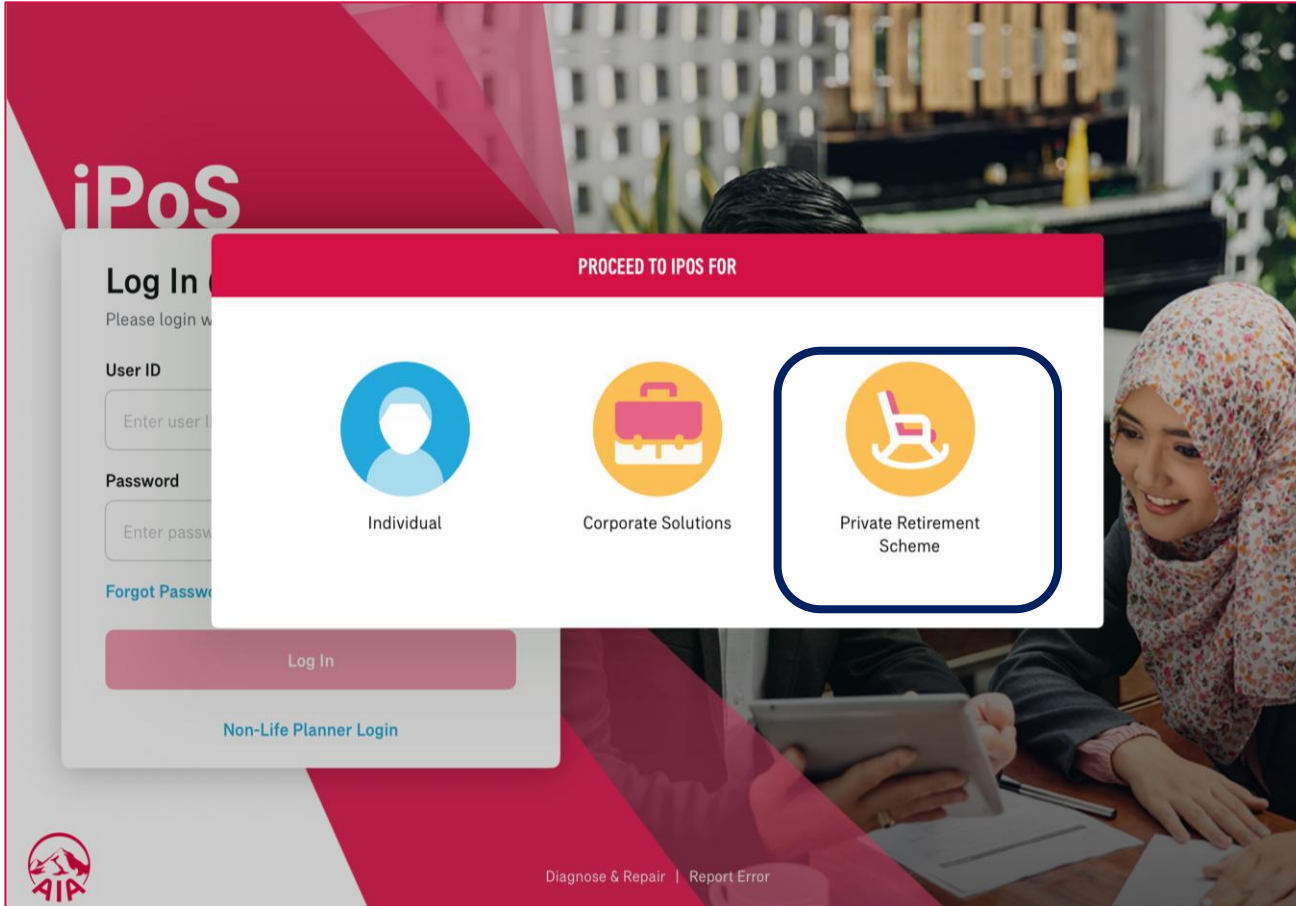
## Overview of steps for each section.

Client Fact Find (CFF)	Fund Selection		E-Application (EAPP)		Payment & Submit	
4 Steps	<b>Default Option</b>	3 Steps	<b>Sign Now</b>	7 Steps	<b>Send Payment Link</b>	5 Steps
	<b>Self-Selection Option</b>	3 Steps	<b>Remote Sign</b>	14 Steps	<b>Direct Pay</b>	2 Steps
	<b>Regular Contribution</b>	3 Steps	<b>Third Party Payment</b>	2 Steps		

1. Please ensure iPOS is updated to latest version.
2. Log in using your existing User ID and password.
3. Click **“Agree”** to accept the **End User License Agreement**.



# iPOS for PRS



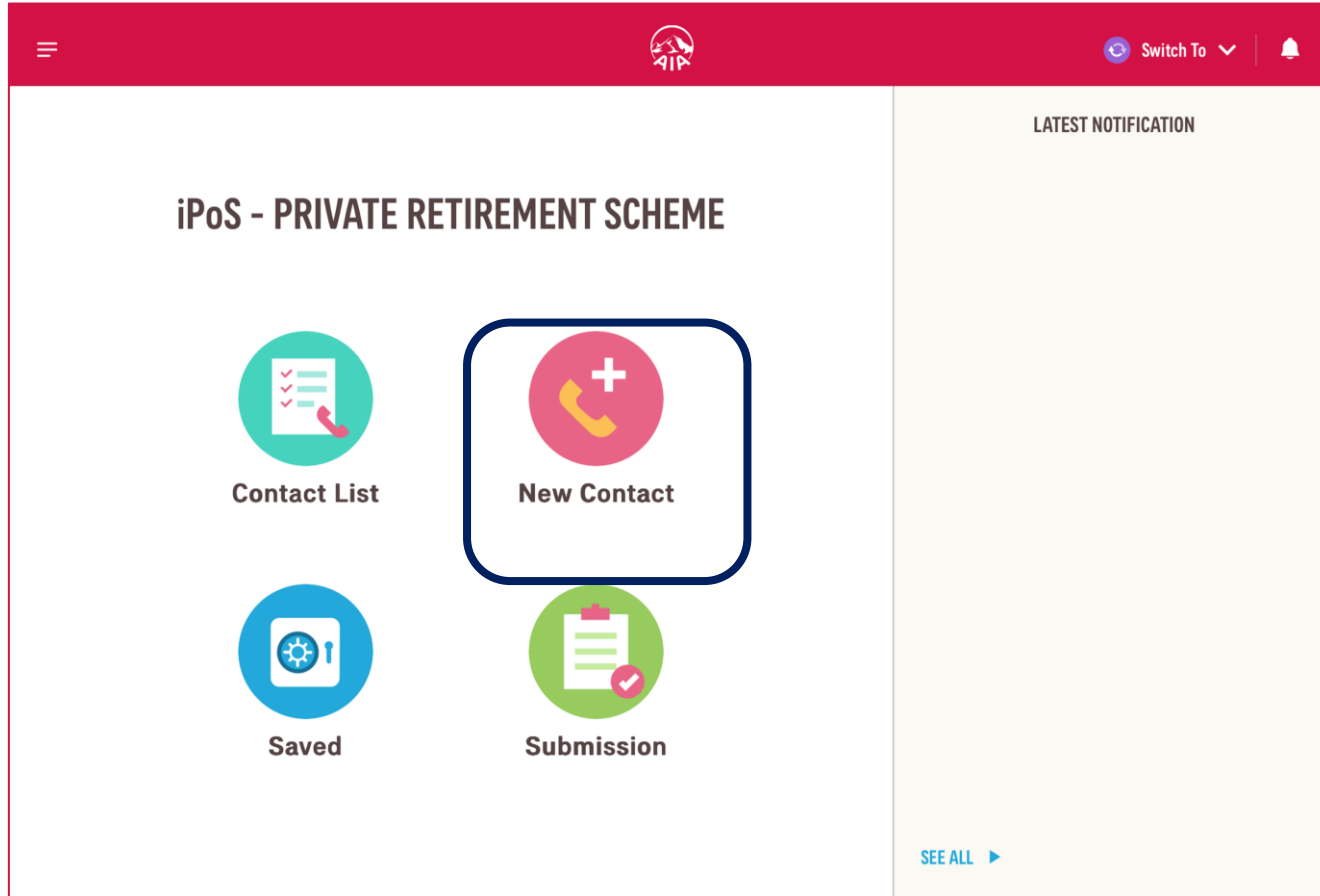
Click on **Private Retirement Scheme**.

*Note: Only active PRS consultants can access.*



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BETTER LIVES

# Client Fact Find (CFF)



Step 1:

To start your submission, click **New Contact**.

< CLIENT INFORMATION

**CLIENT INFORMATION**

Salutation \*  
 ▼  
Please select Salutation

Full Name \*  
  
Please input Full Name

Gender \*  
   
Please select Gender

Mobile No. \*  
 ▼   
Please input Mobile Number

## Step 1.1

Enter the required client information.

*Note:*

*Please ensure full name as per NRIC.*



< CLIENT INFORMATION

CLIENT INFORMATION

Salutation \* **DROP DOWN**

Please Select ▲

- "
- Jr
- Master
- Mdm
- Miss
- Mr
- Ms
- Prof
- Dr

Full Name \*

Name

Please input Full Name

Mobile No. \* **DROP DOWN**

+60 ▼ Mobile Number

Please input Mobile Number

SAVE CONTACT

*Note:*

*Boxes with a triangle ▼ indicate a drop-down box for selection.*

< CLIENT INFORMATION

**CLIENT INFORMATION**

Salutation\*  
Mr

Full Name\*  
Chart King

Gender\*  
FEMALE MALE

Mobile No.\*  
+60 120881888

CANCEL SAVE CONTACT

Step 1.1:

Once completed, click **SAVE CONTACT** to proceed.

**PROFILE**

**Mr Chart King**  
Last Update on 05/03/2026

New IC -	Nationality -	Gender <b>Male</b>	Email -
Tel No. (Home) +60 - (Mobile) +60 12*****88	Age -	Address -	

AIA PRS Member Details  
Please check the AIA PRS member status.

**CHECK**

**SAVED LIST**

Last Update	Transaction Type	Fund Name	Contribution Amount	Status
-------------	------------------	-----------	---------------------	--------

**CLIENT FACT FIND**

Step 2:

Click **CHECK** to verify the client as new or existing AIA PRS member status.



PROFILE

**Mr Chart King**  
Last Update on 05/03/2026

New IC  
-

Tel No.  
(Home) +60 -  
(Mobile) +60 12\*\*\*\*\*88

AIA PRS Member Details  
Please check the AIA PRS member status.

**SAVED LIST**

Last Update Tra

Email  
-

Status

**CHECK AIA PRS MEMBER STATUS**

Please select the ID Type and provide the NRIC/ MY PR/ Passport No. for membership status verification.

ID Type \*

New IC

NRIC/ MY PR/ Passport No. \*

Please Input

Please input ID Number

Date Of Birth \*

01/01/1970

CANCEL CHECK

CLIENT FACT FIND

## Step 2.1

Enter the NRIC.

The Date of Birth will be updated automatically.



**PROFILE**

**Mr Chart King**  
Last Update on 05/03/2026

New IC: \*\*\*\*\*5513  
Nationality: -  
Gender: Male  
Email: -

Tel No.  
(Home) +60 -  
(Mobile) +60 12\*\*\*\*\*88

AIA PRS Member Details  
**NO**

**SAVED LIST**

Last Update	Transaction Type	Fund Name	Contribution Amount	Status
-------------	------------------	-----------	---------------------	--------

**CLIENT FACT FIND**

**CHECK AIA PRS MEMBER STATUS**

AIA PRS Member status check completed for **Mr Chart King**.

AIA PRS Member Details: **NO**

**OK**

## Step 2.1

A Pop-Up will appear to indicate the client's member status.



## Step 2.2

Proceed to fill in the **CLIENT DETAILS**.

MR CHART KING SAVE & EXIT

CLIENT FACT FIND (CFF)

- Personal Details
- Client Profiling Form
- Personal Data Protection

**CLIENT DETAILS** ✓ EMPLOYMENT DETAILS ✓

AIA PRS Member Details  
NO

Salutation \*

ID Type \*

Date Of Birth \*

Place of Birth \*

Full Name \*

NRIC/ MY PR/ Passport No. \*

Age \*

Nationality \*

MR CHART KING SAVE & EXIT

CLIENT FACT FIND (CFF)

- Personal Details
- Client Profiling Form
- Personal Data Protection

**CLIENT DETAILS** ✓ EMPLOYMENT DETAILS ✓

Correspondence Address 1 \*

Correspondence Address 2

Correspondence Address 3

Correspondence Address 4

Postcode \*

City \*

State \*

Country \*

Home Tel No.

Mobile No. \*

< MR CHART KING SAVE & EXIT

CLIENT FACT FIND (CFF)

! Personal Details

! Client Profiling Form

! Personal Data Protection

CLIENT DETAILS ⓘ **EMPLOYMENT DETAILS ⓘ**

Employment Status\*  
Please Select **DROP DOWN**  
Please select Employment Status

Occupation\*  
Please Select **TO CHOOSE**  
Please select Occupation

Office of Employer/Business\*  
Please Select **DROP DOWN**  
Please select Office of Employer/Business

Household Monthly Earned Income Range\*  
Please Select **DROP DOWN**  
Please select Household Monthly Earned Income Range

Industry\*  
Please Select **TO CHOOSE**  
Please select Industry

Name of Employer/Business\*  
Please Input  
Please input Name of Employer/Business

Outside of Malaysia  
Please Select ▼

Malaysia Tax Identification Number (TIN) ⓘ  
Please Input **OPTIONAL**

BACK NEXT

Step 2.3:

Continue with **EMPLOYMENT DETAILS**.

*Note:*

1. Boxes with a triangle ▼ indicate a drop-down selection.

2. "TO CHOOSE" will open a separate page and will auto-populate the Industry field once an Occupation is selected.

SELECT INDUSTRY & OCCUPATION

Search OK

Industry	Occupation	Life	APTAS	APAS	ADB	APDC	RCC	HS	HB	PA
A Automobile Industry	Title									
C Aviation - Commercial	Bank - Armed Guards (No RCC)	2.5/M	4	3	2	Std	N	1.45	1.45	4
E Aviation - Private	Bank - Armoured Car-Driver & Collector (No RCC)	Std	4	3	2	Std	N	1.45	1.45	4
G B										
H Bakelite & Other Non-Pyroxylin Plasti...	Bank - Clerk, Officer, Teller (No RCC)	Std	1	1	1	Std	N	1	1	1
J Bakeries & Biscuits (Excludes of Shop)	Bank Staff (Office Work Only), Investment Adviser, Financial Planner, Credit Analyst, Credit officer	Std	1	1	1	Std	N	1	1	1
N Bar - International Hotels	Car Repossesser - Bank	Std	4	3	2	Std	N	1.3	1.3	4
O Bar - Others										
R Barber / Hairdressing Salon										
T Baths, Beaches & Pools										
V Batik Painter & Printer										
W Battery / Accumulator Manufacturer										
Z										

BACK SAVE

## Step 2.3:

Pop-up page for selecting Industry and Occupation (Banking).

MR CHART KING SAVE & EXIT

### CLIENT FACT FIND (CFF)

- Personal Details
- Client Profiling Form
- Personal Data Protection

CLIENT DETAILS	EMPLOYMENT DETAILS
Employment Status* Employed	Industry* Advertising
Occupation* Advertising Manager, Advertising Assistant	Name of Employer/Business* Ad Sdn Bhd
Office of Employer/Business* In Malaysia	Outside of Malaysia Please Select
Household Monthly Earned Income Range* RM 8,001 - RM 15,000	Malaysia Tax Identification Number (TIN) ⓘ Please Input

[BACK](#) [NEXT](#)

Step 2.4:

After completing both **CLIENT DETAILS** and **EMPLOYMENT DETAILS**, click **NEXT** to proceed.

< MR CHART KING SAVE & EXIT

### CLIENT FACT FIND (CFF)

- Personal Details
- Client Profiling Form**
- Personal Data Protection

**VULNERABLE ASSESSMENT** <sup>!</sup> RISK PROFILE <sup>!</sup>

#### PART A: VULNERABLE CLIENT ASSESSMENT

Last Update on 05/03/2026

This form (formerly known as the PRS Product Suitability Check) serves to help us understand your investment objectives, risk tolerance, financial profile, and other considerations in order for us to provide advice that is suitable to you, having taken into consideration your personal financial circumstances. It is important that you provide true, accurate and complete information to ensure that suitable products are recommended according to your investment needs and objectives. Any misleading, inaccurate, or incomplete information provided by you will affect the outcome of the recommendation made. In such cases, the Private Retirement Scheme Consultant (PRS Consultant) may not be held liable for such recommendation (if any). Please be aware that investing a significant portion of your financial resources, such as savings and/or retirement funds, into a single investment product may pose significant risks.

#### Disclosure by Client

- Elderly (60 and above; and uncomfortable with using technology for investment purposes); and/or
- Education level of Primary School or below; and/or
- No capital market investment experience; and/or
- Low financial resilience (low ability to withstand financial shocks, for example cash flow problems, no savings and/or overly indebted); and/or
- Have experienced death or total permanent disablement of main breadwinner over the last 12-months; and/or
- Have any hearing, visual, speech, physical or learning impairments.

**BACK** **NEXT**

Step 3:

Complete the **VULNERABLE ASSESSMENT**.

MR CHART KING SAVE & EXIT

### CLIENT FACT FIND (CFF)

- Personal Details
- Client Profiling Form**
- Personal Data Protection

**VULNERABLE ASSESSMENT** | **RISK PROFILE**

significant portion of your financial resources, such as savings and/or retirement funds, into a single investment product may pose significant risks.

**Disclosure by Client**

- Elderly (60 and above; and uncomfortable with using technology for investment purposes); and/or
- Education level of Primary School or below; and/or
- No capital market investment experience; and/or
- Low financial resilience (low ability to withstand financial shocks, for example cash flow problems, no savings and/or overly indebted); and/or
- Have experienced death or total permanent disablement of main breadwinner over the last 12-months; and/or
- Have any hearing, visual, speech, physical or learning impairments.
- None of the above

**PRS Consultant Assessment**

- Vulnerable Client
- Non-vulnerable Client

**BACK** **NEXT**

## Step 3.1:

Click where applicable for **Disclosure by Client** and **PRS Consultant Assessment**.

MR CHART KING SAVE & EXIT

### CLIENT FACT FIND (CFF)

- Personal Details
- Client Profiling Form**
- Personal Data Protection

#### VULNERABLE ASSESSMENT

#### **RISK PROFILE**

**DECISION ADVISORY**  
The recommendation is made based on information obtained from the assessment as stated in this form. You are advised to exercise judgment in making an informed decision in relation to the private retirement scheme product.

1. My age is:

Below 45 (5 points)  45 to 54 (3 points)  55 and above (1 point)

2. My household annual income is:

> RM 300,000 (5 points)  RM 200,001 - RM 300,000 (4 points)  RM 100,001 - RM 200,000 (3 points)  RM 50,001 - RM 100,000 (2 points)  RM 0 - RM 50,000 (1 point)

3. I am a client who is:

Aggressive - Able to tolerate high risk (5 points)  Moderate - Able to tolerate some risk (3 points)  Conservative - Risk averse investor (1 point)

**BACK** **NEXT**

Step 3.2:

Please complete the **Risk Profile**.

*Note: Question 1 and Question 2 have already been pre-filled based on the information provided earlier.*

MR CHART KING SAVE & EXIT

CLIENT FACT FIND (CFF)

- Personal Details
- Client Profiling Form**
- Personal Data Protection

**VULNERABLE ASSESSMENT** | **RISK PROFILE**

3. I am a client who is:

- Aggressive - Able to tolerate high risk (5 points)
- Moderate - Able to tolerate some risk (3 points)
- Conservative - Risk averse investor (1 point)

4. I have investment in:

- Growth stocks/funds (5 points)
- Dividend stocks/funds (4 points)
- Bond/Bond funds (3 points)
- Money market funds (2 points)
- I am new to investment (1 point)

5. My investment objective is to achieve:

- Capital growth (5 points)
- Capital growth and income (3 points)
- Income (1 point)

6. My investment duration period is:

- More than 10 years (5 points)
- 5 to 10 years (3 points)
- Less than 5 years (1 point)

**BACK** **NEXT**

Step 3.2:  
Continue with Questions 3 to 6.



Note: If customer opt not to complete the Risk Profile, they will need to “I DECLINE to provide certain..”

DR JOHN VINCENT SAVE & EXIT

CLIENT FACT FIND (CFF)

Personal Details ✓  
Client Profiling Form ✓  
Personal Data Protection ✓

VULNERABLE ASSESSMENT ✓ | RISK PROFILE ✓

3. I am a client who is:

Aggressive - Able to tolerate high risk (5 points)       Moderate - Able to tolerate some risk (3 points)

Conservative - Risk averse investor (1 point)

4. I have investment in:

Growth stocks/funds (5 points)       Dividend stocks/funds (4 points)

Bond/Bond funds (3 points)       Money market funds (2 points)

I am new to investment (1 point)

5. My investment objective is to achieve:

Capital growth (5 points)       Capital growth and income (3 points)

Income (1 point)

6. My investment duration period is:

More than 10 years (5 points)       5 to 10 years (3 points)

Less than 5 years (1 point)

BACK NEXT

DR JOHN VINCENT SAVE & EXIT

CLIENT FACT FIND (CFF)

Personal Details ✓  
Client Profiling Form ✓  
Personal Data Protection ✓

VULNERABLE ASSESSMENT ✓ | RISK PROFILE ✓

Please select either ONE of the following options:

I have decided to purchase a default option fund according to my age (30 years old).  
Name of Fund AIA PAM - GROWTH FUND

I have decided to invest in fund(s) that align with my risk scoring recommendation.

I have decided to invest in fund(s) that do NOT align with my risk scoring recommendation.

I DECLINE to provide certain information required for the 'Understanding Your Needs and Risk Profile' Assessment and I agree that this may adversely affect my profiling assessment.

PRS Consultant's Acknowledgement

I declare that I have assessed the clients' vulnerability (Part A: Vulnerable Client Assessment) and risk profile (Part B: Understanding Your Needs and Risk Profile). Where the client has been identified as a vulnerable client, I have conducted the following measures:

1. I have allowed sufficient time for the client to process all information provided.
2. I have explained to the client on the available communication methods and offered to provide details in an alternative format such as post or email for better clarity.
3. I have confirmed with the client whether they would like to consult someone else first or have someone present with them when receiving advice.
4. I have checked and verified all answers in Part A (Vulnerable Client Assessment).
5. I have explained the features and risks of the product(s), risk profile assessment and provided a copy of the Product Highlights Sheet

BACK NEXT



MR CHART KING SAVE & EXIT

CLIENT FACT FIND (CFF)

- Personal Details
- Client Profiling Form**
- Personal Data Protection

**VULNERABLE ASSESSMENT** | **RISK PROFILE**

Fund(s) Recommendation:

Scoring	Risk Tolerance Level	Recommended Fund(s)
<input type="radio"/> 6 - 14	Conservative	AIA PAM - CONSERVATIVE FUND
<input type="radio"/> 15 - 21	Moderate	AIA PAM - MODERATE FUND AIA PAM - ISLAMIC MODERATE FUND AIA PAM - DIVIDEND INCOME FUND
<input checked="" type="radio"/> 22 - 30	Aggressive	AIA PAM - GROWTH FUND AIA PAM - GLOBAL ISLAMIC GROWTH FUND AIA PAM - DYNAMIC ASIA EX-JAPAN FUND

**Client's Acknowledgement**

- I hereby declare that AIA Pension and Asset Management Sdn. Bhd. and/or its PRS Consultant has explained and I have understood the features, nature as well as the associated risks of the relevant PRS fund(s).
- I have read or the PRS Consultant has explained to me and I clearly understand what is required of me in information provided for

BACK NEXT

## Step 3.2:

Once the Risk Profile has been completed, the total score will be automatically calculated to display the Risk Tolerance Level and the Recommended Fund(s).

## Step 3.2:

Please complete Client's Acknowledgement and PRS Consultant's Acknowledgement.

MR CHART KING SAVE & EXIT

CLIENT FACT FIND (CFF)

- Personal Details
- Client Profiling Form
- Personal Data Protection

VULNERABLE ASSESSMENT | RISK PROFILE

### Client's Acknowledgement

1. I hereby declare that AIA Pension and Asset Management Sdn. Bhd. and/or its PRS Consultant has explained and I have understood the features, nature as well as the associated risks of the relevant PRS fund(s).

2. I have read or the PRS Consultant has explained to me and I clearly understand what is required of me in information provided for the 'Understanding Your Needs and Risk Profile' Assessment and I hereby declare that information disclosed by me for this assessment is true and accurate.

3. I understand that any misleading, inaccurate, or incomplete information provided by me will affect the outcome of the recommendation made. In such cases, AIA Pension and Asset Management Sdn. Bhd. will not be liable for such recommendation (if any).

4. I hereby acknowledge receipt a copy of this PRS Client Profiling Form, Product Highlights Sheet, and Disclosure Document of the relevant PRS fund(s).

Please select either ONE of the following options:

- I have decided to purchase a default option fund according to my age (45 years old).
- I have decided to invest in fund(s) that align with my risk scoring recommendation.
- I have decided to invest in fund(s) that do NOT align with my risk scoring recommendation.
- I DECLINE to provide certain information required for the 'Understanding Your Needs and Risk Profile' Assessment and I agree that this may adversely affect my profiling assessment.

Name of Fund: AIA PAM - MODERATE FUND

BACK NEXT

MR CHART KING SAVE & EXIT

CLIENT FACT FIND (CFF)

- Personal Details
- Client Profiling Form
- Personal Data Protection

VULNERABLE ASSESSMENT | RISK PROFILE

Name of Fund: AIA PAM - MODERATE FUND

- I have decided to invest in fund(s) that align with my risk scoring recommendation.
- I have decided to invest in fund(s) that do NOT align with my risk scoring recommendation.
- I DECLINE to provide certain information required for the 'Understanding Your Needs and Risk Profile' Assessment and I agree that this may adversely affect my profiling assessment.

### PRS Consultant's Acknowledgement

- I declare that I have assessed the clients' vulnerability (Part A: Vulnerable Client Assessment) and risk profile (Part B: Understanding Your Needs and Risk Profile). Where the client has been identified as a vulnerable client, I have conducted the following:

- I have allowed sufficient time for the client to process all information provided.
- I have explained to the client on the available communication methods and offered to provide details in an alternative format such as post or email for better clarity.
- I have confirmed with the client whether they would like to consult someone else first or have someone present with them when receiving advice.
- I have checked and verified all answers in Part A (Vulnerable Client Assessment).
- I have explained the features and risks of the product(s), risk profile assessment and provided a copy of the Product Highlights Sheet and the relevant Disclosure Document in Part B for the client's decision making.

BACK NEXT

AIA confidential and proprietary information. Not for distribution.



## Step 4:

Ensure your client read the **PRIVACY STATEMENT** before ticking the box and click **CONTINUE**.

MR CHART KING SAVE & EXIT

CLIENT FACT FIND (CFF)

- Personal Details
- Client Profiling Form
- Personal Data Protection

### PERSONAL DATA PROTECTION

By participating in PRS's Client Fact Find, I willingly disclosure my personal data, and where required, sensitive information for the purpose(s) for which it is collected or as otherwise required to ensure compliance with applicable laws and regulation. Data may be shared with third parties like service providers and authorities when necessary. You have rights to access, correct, or withdraw your data, and to lodge complaints with regulators.

Please read the link below to proceed tick the box and continue fund selection:

I have read and agreed to the [privacy statement](#).

BACK CONTINUE

aia-prs.com.my

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← HOME PREV | NEXT

## PRIVACY STATEMENT

AIA Malaysia ("AIA Malaysia", "we", "us", "our") is inclusive of AIA Bhd., AIA PUBLIC Takaful Bhd., AIA General Berhad, AIA Pension and Asset Management Sdn. Bhd. and AIA Health Services Sdn. Bhd. and is part of AIA Group Limited group of companies ("AIA Group"). At AIA Malaysia, we recognise our responsibilities in relation to the collection, use, disclosure and other processing and storage of personal data.

If you are in mainland China, this [AIA Malaysia Privacy Addendum](#) also applies to you.

Among the most important assets of AIA Group Limited and/or its subsidiaries ("AIA Group") is the trust and confidence placed to properly handle information. Customers and potential customers expect us to maintain their information accurately, protected against manipulation and errors, secure from theft and free from unwarranted disclosure. We protect data security of our customers and potential customers by complying with all the relevant data protection laws and regulations, and ensure compliance by our staff with strict standards of security and confidentiality.

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# Fund Selection

## Default Option

MR CHART KING SAVE & EXIT

1 Fund Selection 2 E-Application 3 Review & Sign 4 Payment & Submit 5 Done

Transaction Type: New Enrolment Contribution Type: Individual

Fund Allocation

- Default Option**  
Based on client age
- Self-Selection Option**  
Select based on client preferred fund

**AIA PAM - MODERATE FUND**  
The default PRS fund is the recommended fund based on client age.

**ONE-TIME CONTRIBUTION**  
Minimum contribution amount for each fund is RM 100

AIA PAM - MODERATE FUND\* Please input

BACK NEXT

Step 1:  
**Default Option** is selected for fund selection.



## Default Option

< MR CHART KING SAVE & EXIT

1 Fund Selection 2 E-Application 3 Review & Sign 4 Payment & Submit 5 Done

1 Minimum contribution amount for each fund is RM 100

AIA PAM - MODERATE FUND \* 5,000.00

TOTAL ONE-TIME CONTRIBUTION RM 5,000.00

REGULAR CONTRIBUTION VIA DIRECT DEBIT

Would you like to enroll for regular contribution / direct debit via a current and savings account(CASA) to the selected fund(s)?

YES NO

BACK NEXT

Step 2:

Enter the contribution amount (e.g., **RM5,000**).

Click **NO** if the client does not wish to enroll in regular contributions or direct debit.

## Default Option

< MR CHART KING SAVE & EXIT

1 Fund Selection 2 E-Application 3 Review & Sign 4 Payment & Submit 5 Done

Full Name  
Chart King

New IC  
800808-14-5513

Transaction Type  
New Enrolment

Default Option

ONE-TIME CONTRIBUTION	
AIA PAM - MODERATE FUND	RM 5,000.00
<b>TOTAL ONE-TIME CONTRIBUTION</b>	<b>RM 5,000.00</b>

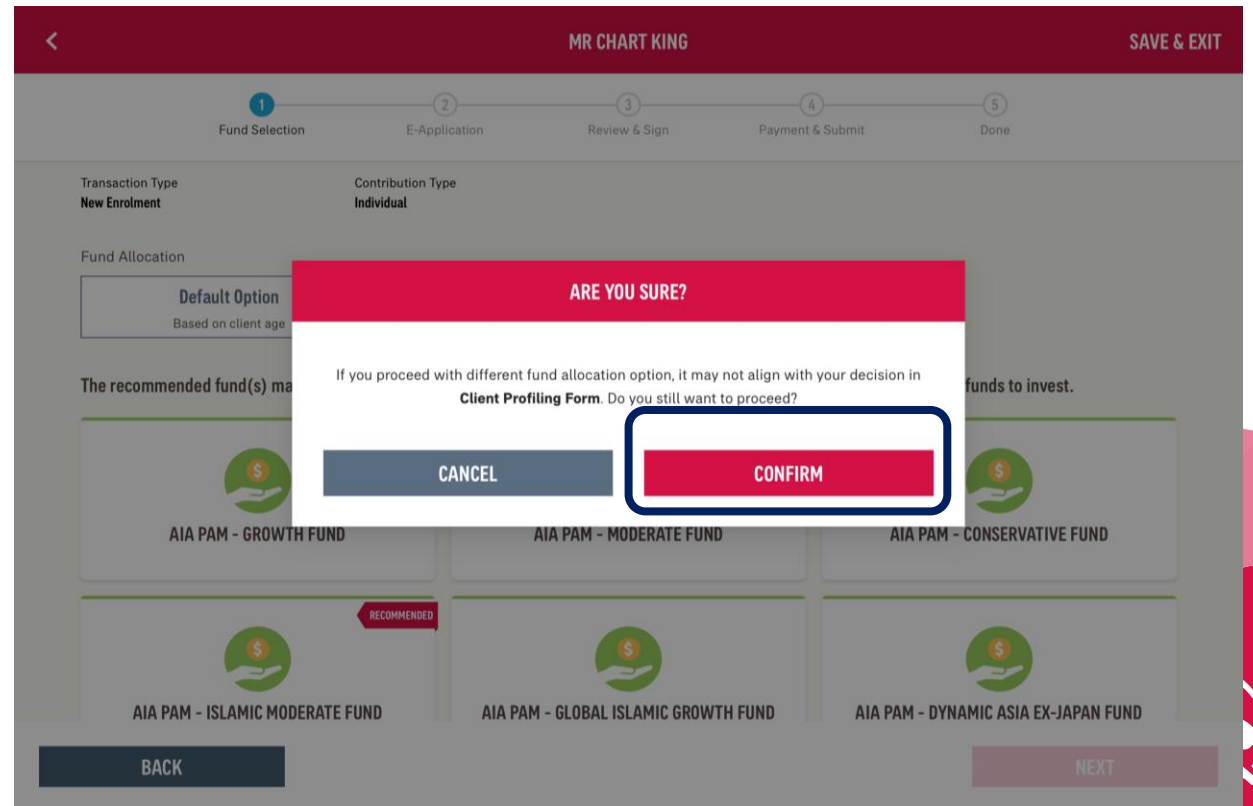
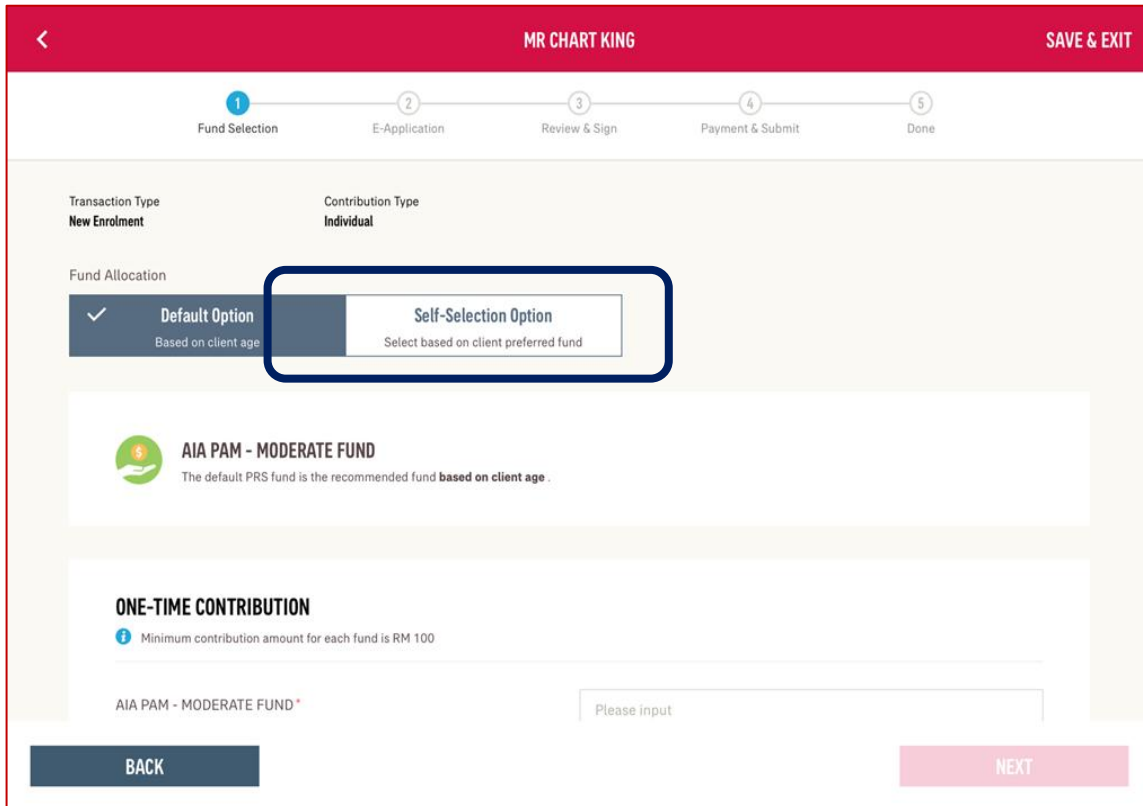
BACK PROCEED TO EAPP

### STEP 3:

Upon completion, click **PROCEED TO EAPP** (E-Application) to continue with the next step.

## Self Selection Option

Step 1:  
Upon selecting the **Self-Selection Option**, a pop-up box will appear for the client to confirm and proceed.



## Self Selection Option

### Step 2:

List of all AIA PAM funds will appear under **Self-Selection Option**. Client may choose any of the fund(s) and to tick the acknowledgement box.

### Note:

*“Recommended” funds are based on the client's age and the Default Option.*

## Self Selection Option

MR CHART KING

SAVE & EXIT

1 Fund Selection 2 E-Application 3 Review & Sign 4 Payment & Submit 5 Done

**ONE-TIME CONTRIBUTION**  
i Minimum contribution amount for each fund is RM 100

AIA PAM - GROWTH FUND*	5,000.00
AIA PAM - DIVIDEND INCOME FUND*	5,000.00

**TOTAL ONE-TIME CONTRIBUTION** **RM 10,000.00**

**REGULAR CONTRIBUTION VIA DIRECT DEBIT**

BACK NEXT

### Step 3:

Client to key in the contribution amount for each selected fund(s).

## Self Selection Option

MR CHART KING SAVE & EXIT

1 Fund Selection 2 E-Application 3 Review & Sign 4 Payment & Submit 5 Done

Full Name: Chart King  
New IC: 800808-14-5513  
Transaction Type: New Enrolment

Self-Selection Option

ONE-TIME CONTRIBUTION	
AIA PAM - GROWTH FUND	RM 5,000.00
AIA PAM - DIVIDEND INCOME FUND	RM 5,000.00
<b>TOTAL ONE-TIME CONTRIBUTION</b>	<b>RM 10,000.00</b>

BACK PROCEED TO EAPP

### Step 3.1:

The contribution amount will appear for each selected fund.

Click **PROCEED TO EAPP** (E-Application) to proceed to the next step.

## Regular Contribution

MR CHART KING

SAVE & EXIT

1 Fund Selection 2 E-Application 3 Review & Sign 4 Payment & Submit 5 Done

### REGULAR CONTRIBUTION VIA DIRECT DEBIT

Would you like to enroll for regular contribution / direct debit via a current and savings account(CASA) to the selected fund(s)?

YES  NO

Select the fund(s) below for which you would like to set up a regular contribution.

Minimum contribution amount for each fund is RM 100

Select All PRS Fund*	Amount (RM)*
<input checked="" type="checkbox"/> AIA PAM - GROWTH FUND	500.00
<input type="checkbox"/> AIA PAM - DIVIDEND INCOME FUND	Please input

Payment Mode

BACK NEXT

### Step 1:

The client may also opt for regular contributions by clicking **YES**.

Please select the fund(s) and enter the contribution amount.

*Note:*  
Minimum contribution amount is RM100.

## Regular Contribution

MR CHART KING

SAVE & EXIT

1 Fund Selection 2 E-Application 3 Review & Sign 4 Payment & Submit 5 Done

AIA PAM - DIVIDEND INCOME FUND

Payment Mode

Billing Cycle\*

Monthly  Yearly

Deduction Cycle Date\*

12th  25th

Effective of Direct Debit

05/2026

Please note that actual deduction date may vary depending on your bank's enrollment approval.

TOTAL REGULAR CONTRIBUTION VIA DIRECT DEBIT RM 500.00

BACK NEXT

### Step 2:

Please select the:

- Billing Cycle: Monthly or Yearly.
- Deduction Date: 12<sup>th</sup> or 25<sup>th</sup> .
- Effective of Direct Debit.

### Note:

*Actual deduction date will depend on client's bank enrollment approval.*

## Regular Contribution

Step 3:

Summary of contributions. Please click **PROCEED TO EAPP** (E-Application) for next step.

MR CHART KING SAVE & EXIT

1 Fund Selection 2 E-Application 3 Review & Sign 4 Payment & Submit 5 Done

### Self-Selection Option

#### ONE-TIME CONTRIBUTION

AIA PAM - GROWTH FUND	RM 5,000.00
AIA PAM - DIVIDEND INCOME FUND	RM 5,000.00

**TOTAL ONE-TIME CONTRIBUTION** **RM 10,000.00**

#### REGULAR CONTRIBUTION VIA DIRECT DEBIT

Billing Cycle	Deduction Cycle Date	Effective Date of Direct Debit
Monthly	25th	May 2026

AIA PAM - GROWTH FUND	RM 500.00
-----------------------	-----------

**TOTAL REGULAR CONTRIBUTION VIA DIRECT DEBIT** **RM 500.00 / MONTH**

**BACK** **PROCEED TO EAPP**

MR CHART KING SAVE & EXIT

1 Fund Selection 2 E-Application 3 Review & Sign 4 Payment & Submit 5 Done

**TOTAL ONE-TIME CONTRIBUTION** **RM 10,000.00**

#### REGULAR CONTRIBUTION VIA DIRECT DEBIT

Billing Cycle	Deduction Cycle Date	Effective Date of Direct Debit
Monthly	25th	May 2026

AIA PAM - GROWTH FUND	RM 500.00
-----------------------	-----------

**TOTAL REGULAR CONTRIBUTION VIA DIRECT DEBIT** **RM 500.00 / MONTH**

**REGULAR CONTRIBUTION VIA DIRECT DEBIT INFO**  
Regular Contribution payment is NOT required during this submission. The 1st payment will be deducted from your account upon your successful registration with Bank.

**BACK** **PROCEED TO EAPP**



Upon completing **Default Option / Self Selection / Regular Contribution**:  
Click **NEXT** to proceed to **E-Application (EAPP)** after reading the Important Notes.

MR CHART KING

SAVE & EXIT

Fund Selection 2 E-Application 3 Review & Sign 4 Payment & Submit 5 Done

General

One-Time Contribution Payor

FATCA Declaration

CRS Declaration

### Private Pension Administrator Malaysia (PPA)

The Private Pension Administrator (PPA) is a body approved under section 139C of the Capital Markets and Services Act 2007 to perform the function of record keeping, administration and customer service for members and contributors in relation to contributions made in respect of a private retirement scheme. All PRS applicants are required to open an account with the PPA and upon successful creation of the respective account, the PRS applicants are subsequently referred to as PPA members.

### Important Notes

- The Income Tax (Automatic Exchange of Financial Account Information) Rules 2016, Foreign Account Tax Compliance Act (FATCA) and Common Reporting Standard (CRS) require APAM to collect and report certain information about an Account Holder's tax residence for the purpose of automatic exchange of financial account information. This is a Self-Certification to be completed by you to APAM for the said purpose.
- In general, tax residence is the country in which you live. Special circumstances (such as studying abroad, working overseas, or extended travel) may cause you to be resident elsewhere or resident in more than one country/jurisdiction at the same time (dual residency). The country/countries in which you pay income tax are likely to be your country/countries of tax residence. For more information on tax residence, please consult your tax adviser or the information at <https://www.oecd.org/tax/automatic-exchange/crs-implementation-and-assistance/tax-residency/>
- If your tax residence (or the Account Holder, if you are completing the form on their behalf) is located outside Malaysia, the information collected herein and other financial information with respect to your financial accounts may be transmitted by APAM to the government authorities or regulatory bodies for transfer to the tax authority of another country(ies)/jurisdiction(s).
- You can find summaries of defined terms such as an Account Holder, and other terms, in the Appendix (Page 10 and 11)
- This form will remain valid unless there is a Change in Circumstances relating to information, such as the Account Holder's tax residency status or other mandatory field information, that makes this form incorrect or incomplete. In that case, you are required to immediately inform APAM of any changes promptly and provide an updated Self-Certification Form.
- You are required to complete this Self-Certification in full (unless stated otherwise).
- As a Financial Institution, we are not allowed to give tax advice.** If you have any questions on this Self-Certification Form or your tax residency status, please refer to your tax adviser or the Frequently Asked Questions (FAQs) for Common Reporting Standard available in AIA portal at <https://www.aia.com.my>.
- You can also find out more, including a list of jurisdictions that have signed agreement to automatically exchange information, along with details about the information being requested on the OECD automatic exchange of information portal at <https://www.oecd.org/tax/transparency/what-we-do/>. Separately, you can also find more information on the Inland Revenue Board of Malaysia's portal at <http://www.hasil.gov.my/CRS>.

BACK NEXT

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# E-Application (EAPP)

MR CHART KING

SAVE & EXIT

Fund Selection 2 E-Application 3 Review & Sign 4 Payment & Submit 5 Done

General

One-Time Contribution Payor

FATCA Declaration

CRS Declaration

**SOURCE OF FUND / WEALTH**

**PAYOR / CONTRIBUTOR DETAILS**

If you are the Unit Holder, are you also the Payor/Contributor of the One-Time Contribution fund(s)?

YES NO

**UNIT HOLDER DETAILS**

**Source of Fund\***

Salary / Business income

Sales of assets

Inheritance

Personal savings

Sales of other investments

Others

**Source of Wealth\***

Salary or commission from current and/or past employment

Savings from past employment or business

BACK

NEXT

Step 1:

Complete the **SOURCE OF FUND / WEALTH** declaration and click **NEXT**.

*Note:*

*Unit Holder (customer) is also the Payor/Contributor for this example.*

## Step 2: Complete the **FOREIGN ACCOUNT TAX COMPLIANCE ACT (FATCA) DECLARATION** and click **NEXT**.

MR CHART KING

SAVE & EXIT

Fund Selection E-Application Review & Sign Payment & Submit Done

General

One-Time Contribution Payor

FATCA Declaration

CRS Declaration

### FOREIGN ACCOUNT TAX COMPLIANCE ACT (FATCA) DECLARATION

#### U.S. Person Declaration

The term U.S. person or United States person means a person described in section 7701(a)(30) of the Internal Revenue Code. The term "United States person" means a citizen or resident of the United States

Are you a U.S. citizen? YES NO

Are you a U.S. Resident? YES NO

Do you hold a U.S. Permanent Resident Card (Green Card)? YES NO

Non-U.S. person

I hereby declare and agree that, by contributing this AIA Private Retirement Scheme and signing below, I represent that I am not a "US person" for U.S. federal income tax purposes and that I am not acting for, or on behalf of, a U.S. person. I understand that AIA Pension and Asset Management Sdn Bhd. ("APAM"), believing this statement to be true, will rely on it and act on it. In the event this statement is false, my account may be terminated in which case APAM shall notify me and repay my investment less charges and tax penalty, if any at point of termination in the event of such termination. In view that this is a fundamental term, APAM shall be entitled to terminate my account.

#### U.S. Person - Change of Circumstances

BACK NEXT

MR CHART KING

SAVE & EXIT

Fund Selection E-Application Review & Sign Payment & Submit Done

General

One-Time Contribution Payor

FATCA Declaration

CRS Declaration

### U.S. Person - Change of Circumstances

I agree to notify APAM within thirty days (30) of any change in my status as U.S. person for the purposes of U.S. federal income tax.

\*Note: A false statement or misrepresentation of tax status by a U.S. person could lead to penalties under U.S. law.

Account holders who have or may have U.S. Indicia: **\*Note: The below paragraph applies only to:**

(i) U.S. persons for U.S. federal income tax purposes; or (ii) If your tax status changes and you become a U.S. Person; or (iii) You or beneficiaries in connection with this AIA Private Retirement Scheme contribution have indicated through information provided to us that you or such beneficiary may be in fact a U.S. person for U.S. federal income tax purposes (including for example a U.S. address, a U.S. telephone number, a TIN etc.). The term "U.S. Indicia" as used below refers to any of the three circumstances described in (i) to (iii) above. This is a fundamental term and in the event you have U.S. Indicia and fail after request to provide such information, consent and/or assistance as APAM may from time to time reasonably require to allow it to comply with its contractual, legal and/or regulatory obligations under the United States Foreign Account Tax Compliance Act, including any required reporting to the Internal Revenue Service of information relating to you or beneficiaries in connection with this AIA Private Retirement Scheme contribution, APAM reserves the right and shall be entitled to take the necessary action which may include submitting the necessary reports, suspending your account, withholding the necessary monies to be remitted, terminating your account and returning your investment less any charges and tax penalty, if any at point of termination in the event of such termination.

#### FATCA Data Privacy Waiver (applicable to both individuals and corporates)

APAM and its affiliates ("the Group") are subject to and required to, or have agreed to, comply with certain legal, regulatory and/or other requirements ("the Reporting Requirements"). As such, I provide my express consent that APAM shall have the right to provide such personal data and information to any governmental authorities, regulatory bodies and/or any other person(s) in respect of the Reporting Requirements. I understand that such disclosures may involve the cross border transfer of personal data outside the jurisdiction and that such disclosures may be with respect to i) the personal data of the owner, the contingent owner and the beneficiaries ("the Parties"), or any of them; ii) any information relating to my account; and iii) any information relating to any other accounts held by the Parties or any of them. I understand that APAM will not be able to sell any private retirement scheme product to me and provide any service if I refuse to give the said express consent."

BACK NEXT



6:53 PM Thu 5 Mar 83%

MR CHART KING SAVE & EXIT

Fund Selection 2 E-Application 3 Review & Sign 4 Payment & Submit 5 Done

General ✓  
One-Time Contribution Payor ✓  
FATCA Declaration ✓  
CRS Declaration ✓

**COMMON REPORTING STANDARS - SELF-CERTIFICATION FORM (INDIVIDUAL)**

**Identification of PRS member**

Do you have any tax residency in country(ies) other than Malaysia?

YES  NO

BACK PROCEED

Step 3:

Complete the **COMMON REPORTING STANDARDS** step and click **NEXT**.

MR CHART KING SAVE & EXIT

Fund Selection  E-Application  **Review & Sign**  Payment & Submit  Done

**CHART KING**

**IMPORTANT:** Please make sure the client has viewed ALL documents and agreed to the T&Cs before proceeding to e-signature.

Transaction Type New Enrolment	New IC 800808-14-5513	Gender Male	Marital Status Single	Age 45
Email king88@gmail.com	Contact Number +60 120881888			

- EAPP** **One-Time Contribution**  
AIA PAM - MODERATE FUND: **RM 5,000.00**  
Date Created: **05/03/2026 7:18 PM** [REVIEW](#)
- PRODUCT HIGHLIGHTS SHEET** Core Funds [REVIEW](#)
- DISCLOSURE DOCUMENT** [REVIEW](#)
- CLIENT SIGNATURE**



## Step 4:

Ensure client to review and read all the documents (ie. **EAPP, Product Highlight Sheet, etc**) before proceeding with signing.

## Step 4.1:

EAPP REPORT: Scroll down to read and click **CONFIRM** to proceed.

**EAPP REPORT**

 AIA Pension and Asset Management Sdn. Bhd. **PRIVATE RETIREMENT SCHEME (PRS) ACCOUNT OPENING FORM** 

PPA Account No: \_\_\_\_\_

PPA Member:  New  Existing

Channel:  PRS Consultant (Provider)  AIA Corporate Solution  
 Corporate PRS Distributor  Institutional PRS Advisor **MASTER A/C No:** \_\_\_\_\_

**PARTICULARS OF APPLICANT (UNIT HOLDER)**

*All fields MUST be completed. You must be 18 years and above as at the date of this application. Please provide a clear copy of your NRIC or Passport.*

**Full Name:** Chart King  
(as per NRIC/Passport)

**Salutation:**  Mr  Mrs  Ms  Others \_\_\_\_\_ **NRIC No. (Malaysia):** 800808-14-5513

**Passport No. (Foreigner):** \_\_\_\_\_ **Country of Issue:** \_\_\_\_\_

**Date of Birth:** 08/08/1980 (DDMMYYYY) **Gender:**  Male  Female

**Place of Birth:** Petaling Jaya **Age:** 45

**Marital:**  Single  Married  Others \_\_\_\_\_ **Race:**  Malay  Chinese  Indian  Others \_\_\_\_\_

**Nationality:**  Malaysian  Non-Malaysian  
(Please state the Nationality for Non-Malaysian)

**Mother's Maiden Name:** Soo

**Source of Fund**  Salary / Business income  Personal savings  Sales of assets  Sales of other investments  
 Inheritance  Others, please specify \_\_\_\_\_

**Source of Wealth**  Salary or commission from current and/ or past employment  Savings from past employment or Business  Sales of investments (shares / unit trusts etc.)  
 Sales of assets  Business or trade income  Rental income  
 Inheritance or gift  Others, please specify \_\_\_\_\_

**[FOR FOREIGN NATIONAL ONLY]**  
Are you residing outside Malaysia?  Yes  No

**EAPP REPORT**

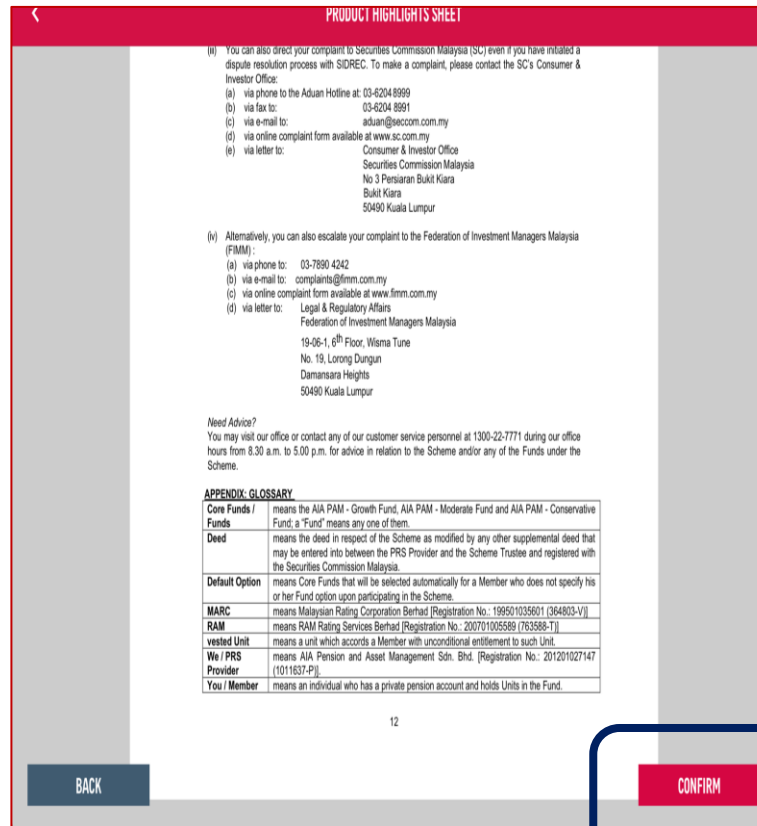
Version July 2025 Page 15 of 15

**EDIT** **CONFIRM**



## Step 4.2

PRODUCT HIGHLIGHT SHEET: Scroll down to read and click **CONFIRM** to proceed.

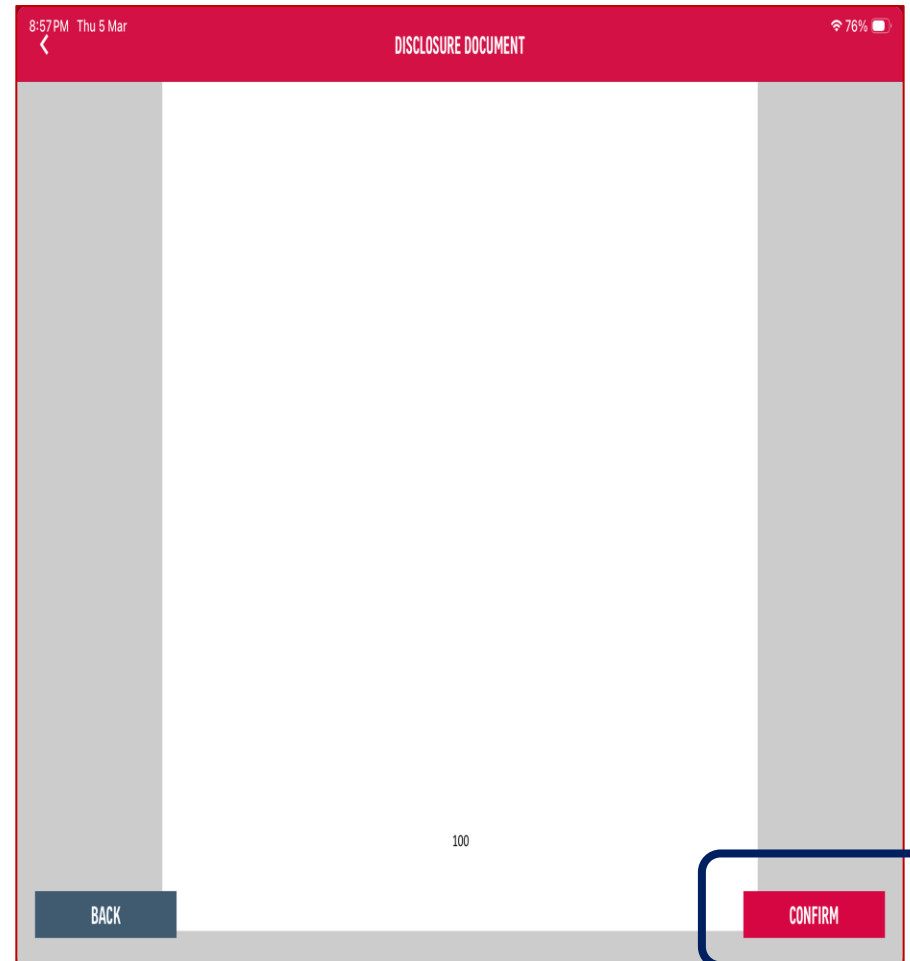
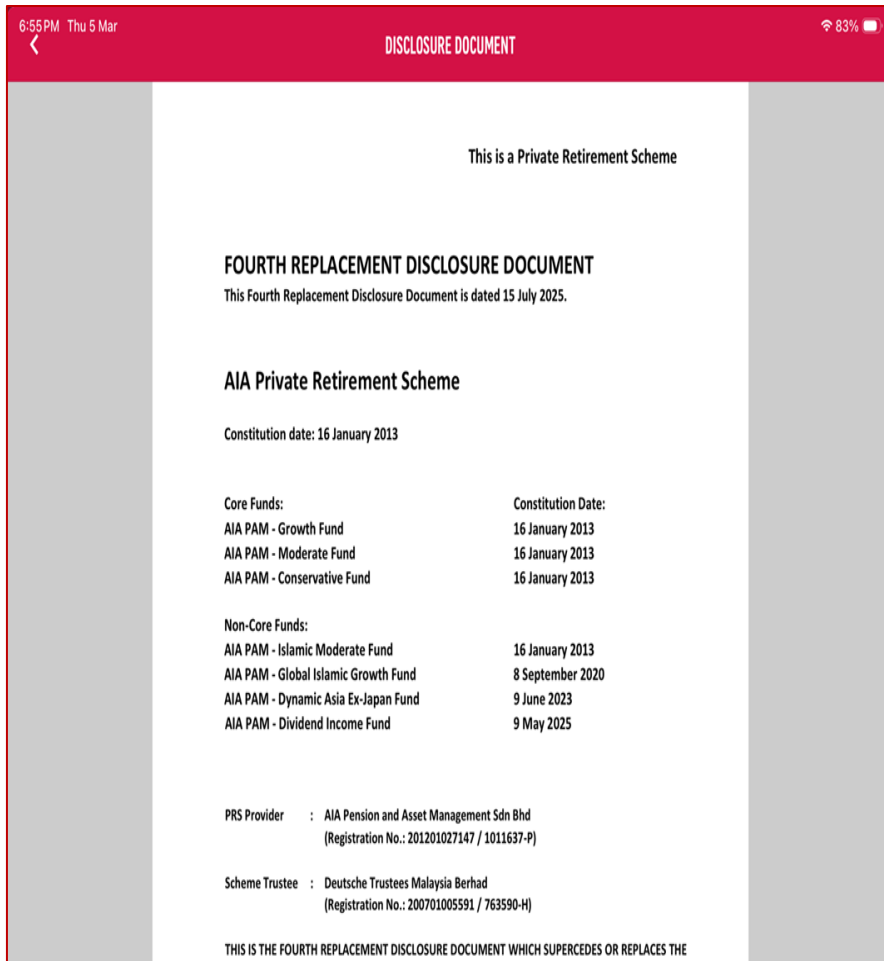


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## Step 4.3:

DISCLOSURE DOCUMENT: Scroll down to read and click **CONFIRM** to proceed.



MR CHART KING SAVE & EXIT

Fund Selection ✓ E-Application ✓ **Review & Sign 3** Payment & Submit 4 Done 5

**CHART KING**

**IMPORTANT:** Please make sure the client has viewed ALL documents and agreed to the T&Cs before proceeding to e-signature.

**CLIENT SIGNATURE**

**SIGN NOW** **REMOTE SIGN**

**DOCUMENTS**

**UNIT HOLDER / ONE-TIME CONTRIBUTION PAYOR**

Full Name	ID Type	ID Number	Nationality	Gender
Chart King	New IC	800808-14-5513	MALAYSIAN	Male

New IC

New IC Front New IC Back

I hereby verify that I have sighted the original document provided by the client.

**BACK** **PROCEED**

Step 5:  
**CLIENT SIGNATURE:**  
Client to select **SIGN NOW** or **REMOTE SIGN**.



Done

### DECLARATION AND SIGNATURE

a) I acknowledge that I have received, read and understood the Third Replacement Disclosure Document for the Fund(s) to be invested in, its supplementary(ies) (if any), and the terms and conditions stipulated in (i) the Provider's website ([www.aia-prs.com.my](http://www.aia-prs.com.my)), (ii) the PPA's website ([www.ppa.my](http://www.ppa.my)), (iii) the terms and conditions of this form and (iv) the personal data protection of this form and I undertake to be bound by them for my initial and subsequent transactions with APAM. I acknowledge that the same have been explained to me by APAM and/or registered PRS consultant.

b) I hereby declare that the particulars given herein including FATCA Declaration and CRS Self-Certification Form (Individual) are true, correct and complete and that I have not withheld any material facts or information which may influence the acceptance of this application.

c) I am aware of the fees and charges that will be incurred by me directly or indirectly when investing in the PRS fund(s).

d) I declare that I have not been convicted by any court for any criminal offence whether within or outside Malaysia.

e) I certify that I am the account holder of all the account(s) to which this form relates to.

f) I acknowledge and agree that (a) the information contained in this FATCA Declaration and CRS Self-Certification Form (Individual) is collected and may be kept by the Company for the purpose of FATCA and automatic exchange of financial account information; and (b) the information contained in this form and any information on reportable account(s) may be reported by the Company to any government authorities, regulatory bodies, Internal Revenue Service and exchanged with the tax authorities of another country(ies)/jurisdiction(s) in which I may be a tax resident pursuant to intergovernmental agreements to exchange financial account information.

g) I undertake to inform APAM within thirty (30) days of any changes in circumstance which causes any information contained in this Private Retirement Scheme (PRS) Account Opening Form to be incorrect and incomplete and affect my tax residency status, and to provide APAM with an updated FATCA and CRS Self-Certification and declaration.

h) I hereby CONFIRM that the information provided by me in this form is true and correct. I AGREE with the PRS Consultant's assessment result of my vulnerable client status based on the information provided by me. I also ACKNOWLEDGE that the PRS Consultant has taken the following measures in consideration of my vulnerability status:





- a) Allowed me sufficient time to review and provide the necessary information required in this form;
- b) Explained the available communication methods and offered to provide details in an alternative format such as post or email for better clarity; and
- c) Confirmed whether I would like to consult someone else first or have someone present with me when receiving advice.

i) I understand and agree that any personal information collected or held by AIA Pension and Asset Management Sdn. Bhd. (hereinafter referred to as "APAM") may be used and disclosed by APAM to individuals/organisations related to and associated with APAM or any selected third party (within or outside of Malaysia, including but not limited to regulators/authorities, industry associations/federations and credit reporting agencies) for the purpose of (a) processing this form; (b) providing subsequent service; (c) for AIA data matching; and (d) for regulatory and/or statutory compliance purposes. I understand that I/we have the right to obtain access to and to request correction of any personal information held by APAM concerning me/us. Such request can be made to any of AIA's Customer Service Centres. For more information in relation to the manner APAM deals with personal data, please refer to the latest Privacy Statement on our website at [www.aia-prs.com.my](http://www.aia-prs.com.my). APAM may review and/or update the Privacy Statement from time to time to reflect the changes in laws and/or APAM's internal policy.

Done

c) Confirmed whether I would like to consult someone else first or have someone present with me when receiving advice.

i) I understand and agree that any personal information collected or held by AIA Pension and Asset Management Sdn. Bhd. (hereinafter referred to as "APAM") may be used and disclosed by APAM to individuals/organisations related to and associated with APAM or any selected third party (within or outside of Malaysia, including but not limited to regulators/authorities, industry associations/federations and credit reporting agencies) for the purpose of (a) processing this form; (b) providing subsequent service; (c) for AIA data matching; and (d) for regulatory and/or statutory compliance purposes. I understand that I/we have the right to obtain access to and to request correction of any personal information held by APAM concerning me/us. Such request can be made to any of AIA's Customer Service Centres. For more information in relation to the manner APAM deals with personal data, please refer to the latest Privacy Statement on our website at [www.aia-prs.com.my](http://www.aia-prs.com.my). APAM may review and/or update the Privacy Statement from time to time to reflect the changes in laws and/or APAM's internal policy.

 Signature of Consultant WOFW YXX EHFYFF	 Signature of Unit Holder Chart King
 Signature of One-Time Contribution Payor	 Signature of Direct Debit Payor

## Step 6:

Upon clicking Signing, the system will redirect to the **Declaration and Signature** page.

The client and consultant must sign accordingly and click **DONE** once completed.

The screenshot shows the 'Review & Sign' step of the E-Application process for 'MR CHART KING'. At the top, a progress bar indicates five steps: Fund Selection (1), E-Application (2), Review & Sign (3), Payment & Submit (4), and Done (5). The client's details are listed as follows:

Full Name	ID Type	ID Number	Nationality	Gender
Chart King	New IC	800808-14-5513	MALAYSIAN	Male

Below the details, there are two photo upload slots for the 'New IC'. The first slot contains a photo of the front of a Malaysian NRIC, and the second slot contains a photo of the back of the NRIC with a signature. A checkbox is checked with the text: 'I hereby verify that I have sighted the original document provided by the client'. Below this, a 'DECLARATION AND SIGNATURE' section is highlighted with a blue box. It contains a checked checkbox and the text: 'I acknowledge that I have read and accepted all the terms and conditions set forth herein and confirm that all the declarations are true and correct.' At the bottom right, a red 'PROCEED' button is highlighted with a blue box. A 'BACK' button is visible at the bottom left.

## Step 7:

Please upload **NRIC** front and back and tick the required verification and declaration boxes accordingly.

Then click **PROCEED**.

## Note:

*Please ensure that the photo of the NRIC is captured clearly and properly, as shown in the sample image.*



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# PAYMENT & SUBMIT

MR CHART KING

SAVE & EXIT

Fund Selection E-Application Review & Sign Payment & Submit Done

TOTAL PAYABLE AMOUNT RM 5,000.00

PAYMENT DETAILS AND UPLOAD RECEIPT

Payment Method ⓘ

SEND PAYMENT LINK DIRECT PAY

Payment ID: 001

⚠️ [REVIEW & E-SIGN PAYMENT FORM](#)

CAMPAIGN CODE

PROCEED TO SUBMIT


## Step 1:

To proceed with payment, please click the **REVIEW & E-SIGN PAYMENT FORM**.

## Step 2:

**REVIEW & E-SIGN PAYMENT FORM:** Please read and Click **CONFIRM** to proceed.

ENDORSEMENT



AIA Pension and Asset Management Sdn. Bhd.

**ENDORSEMENT**

Attached to and forming part of the application form ref no. 5b6e0-1481-499c-a36c-f127db750179

**PAYMENT DETAILS / BUTIR-BUTIRAN BAYARAN**

Method of Payment / Cara Bayaran: Send Payment Link

1. I confirm that the declared Payor information is the same as that of the Holder of the bank account!  
*Saya mengesahkan bahawa maklumat Pembayar yang diisytiharkan adalah sama dengan maklumat Pemegang akaun bank*

2. In the event that there is inaccurate information provided!  
*Sekiranya terdapat maklumat yang tidak tepat yang diisytiharkan:*

a. APAM reserves the right to reject the application and refund the payment accordingly!  
*APAM mempunyai hak untuk membatalkan permohonan dan pembayaran tersebut*

Note: / Nota:

i. Selecting "Send Payment Link" / "Direct Pay" means selection of Current Account/Savings Account (CASA) for making the one-time payment!  
*Pemilihan "Send Payment Link" / "Direct Pay" bermaksud memilih Akaun Semasa/Simpanan (CASA) untuk membuat pembayaran tersebut*

ii. The payment method of this application will be based on your selection in the AIA iPOS!  
*Kaedah pembayaran bagi permohonan ini adalah berdasarkan pemilihan anda di AIA iPOS*

iii. Please refer to the Terms and Conditions in the E-Application herein!  
*Sila rujuk kepada Terma dan Syarat dalam E-Permohonan*

ENDORSEMENT

*Sekiranya terdapat maklumat yang tidak tepat yang diisytiharkan:*

a. APAM reserves the right to reject the application and refund the payment accordingly!  
*APAM mempunyai hak untuk membatalkan permohonan dan pembayaran tersebut*

Note: / Nota:

i. Selecting "Send Payment Link" / "Direct Pay" means selection of Current Account/Savings Account (CASA) for making the one-time payment!  
*Pemilihan "Send Payment Link" / "Direct Pay" bermaksud memilih Akaun Semasa/Simpanan (CASA) untuk membuat pembayaran tersebut*

ii. The payment method of this application will be based on your selection in the AIA iPOS!  
*Kaedah pembayaran bagi permohonan ini adalah berdasarkan pemilihan anda di AIA iPOS*

iii. Please refer to the Terms and Conditions in the E-Application herein!  
*Sila rujuk kepada Terma dan Syarat dalam E-Permohonan*

BACK

CONFIRM



MR CHART KING

SAVE & EXIT

Fund Selection E-Application Review & Sign Payment & Submit Done

TOTAL PAYABLE AMOUNT RM 5,000.00

PAYMENT DETAILS AND UPLOAD RECEIPT

Payment Method **SEND PAYMENT LINK** DIRECT PAY

Payment ID: 001

REVIEW & E-SIGN PAYMENT FORM

CAMPAIGN CODE

PROCEED TO SUBMIT

## Step 3:

Click **SEND PAYMENT LINK** as payment method (FPX transaction) and **PROCEED TO SUBMIT**.

### Note:

The maximum amount allowed for **SEND PAYMENT LINK** is **RM30,000**.

For any amount exceeding **RM30,000**, the customer may:

- Make additional submissions; or
- Submit payment via **DIRECT PAY** (cheque or bank draft).

## CAMPAIGN CODE: Optional (for Special Sales Charge Request)

MR CHART KING

SAVE & EXIT

Fund Selection E-Application Review & Sign Payment & Submit Done

Payment Method ⓘ

SEND PAYMENT LINK DIRECT PAY

Payment ID: 001

REVIEW & E-SIGN PAYMENT FORM

**CAMPAIGN CODE**

ⓘ Please upload approval email here.

Zero Sales Charge Request

Willing, Sam-CK

Willing, Sam-CK

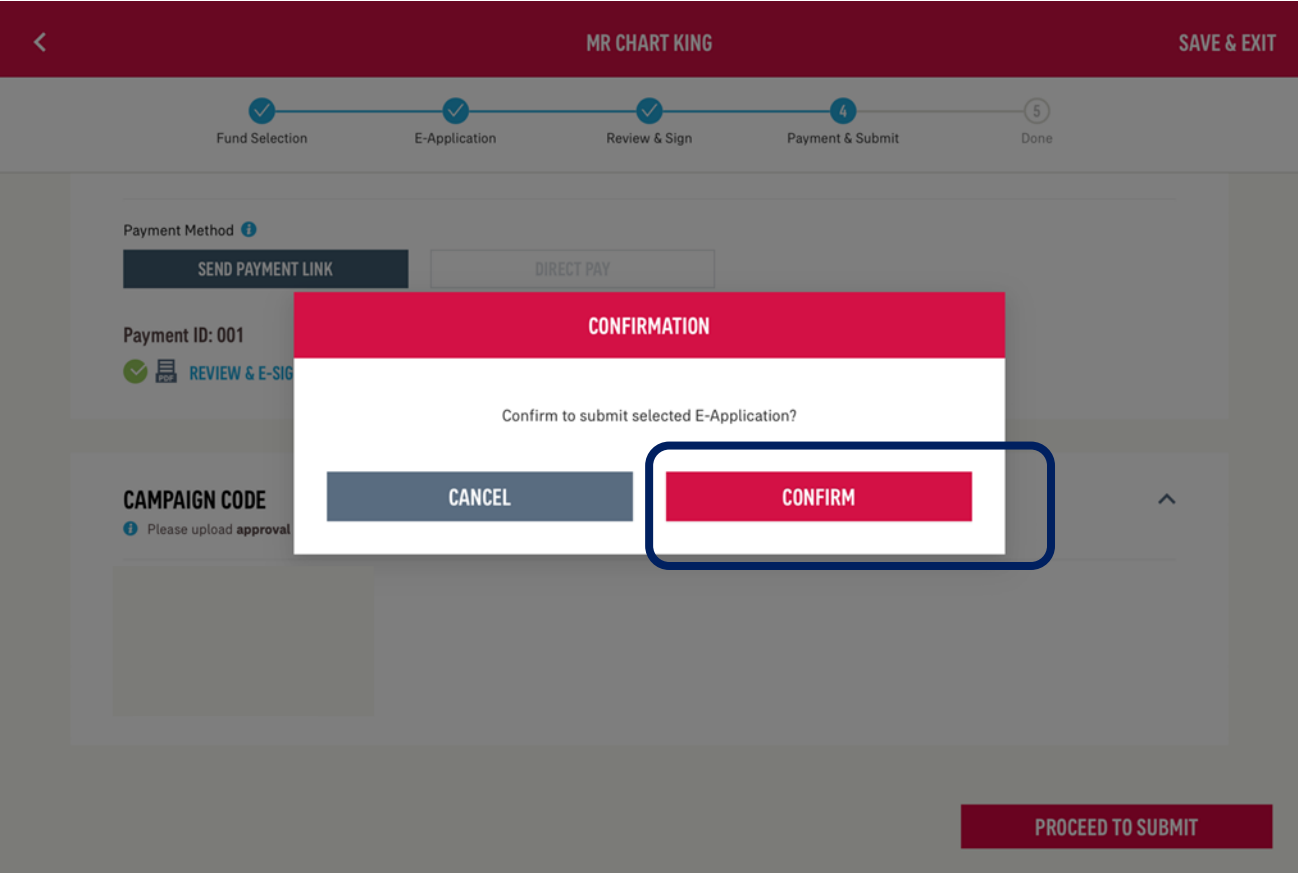
PROCEED TO SUBMIT

*Note:*

*For submission with Special Sales Charge Request (ie. ZERO SALES CHARGE), please upload the approval email under the **CAMPAIGN CODE**.*

**Do not click if not applicable.**

*For more information regarding special Sales Charge Request, please contact your respective Agency Cross Sell (ASC) DOAs.*



Step 3.1:  
Click **CONFIRM** to submit the selected E-Application (EAPP).



The screenshot shows the mobile application interface for 'MR CHART KING'. At the top, there is a progress bar with five steps: Fund Selection, E-Application, Review & Sign, Payment & Submit (current step), and Done. Below the progress bar, there are sections for 'Payment Method', 'SEND PAYMENT', 'Payment ID: 001', 'REVIEW & E-S', and 'CAMPAIGN CODE'. A 'CONFIRMATION' dialog box is overlaid on the screen, containing the following text: 'Payment link will be send to:', a dropdown menu with '+60', a text input field with '120881888', and another text input field with 'king88@gmail.com'. Below this, there is an 'Important Notice' section with two bullet points: 'Submission will be pending until payment is successfully completed via payment link.' and 'Please note that only current and saving account of NORAZILA BINTI AHMAD ZAINI is allowed for contribution payment.' At the bottom of the dialog are 'CANCEL' and 'SEND' buttons. A 'PROCEED TO SUBMIT' button is visible at the bottom right of the application screen.

## Step 4:

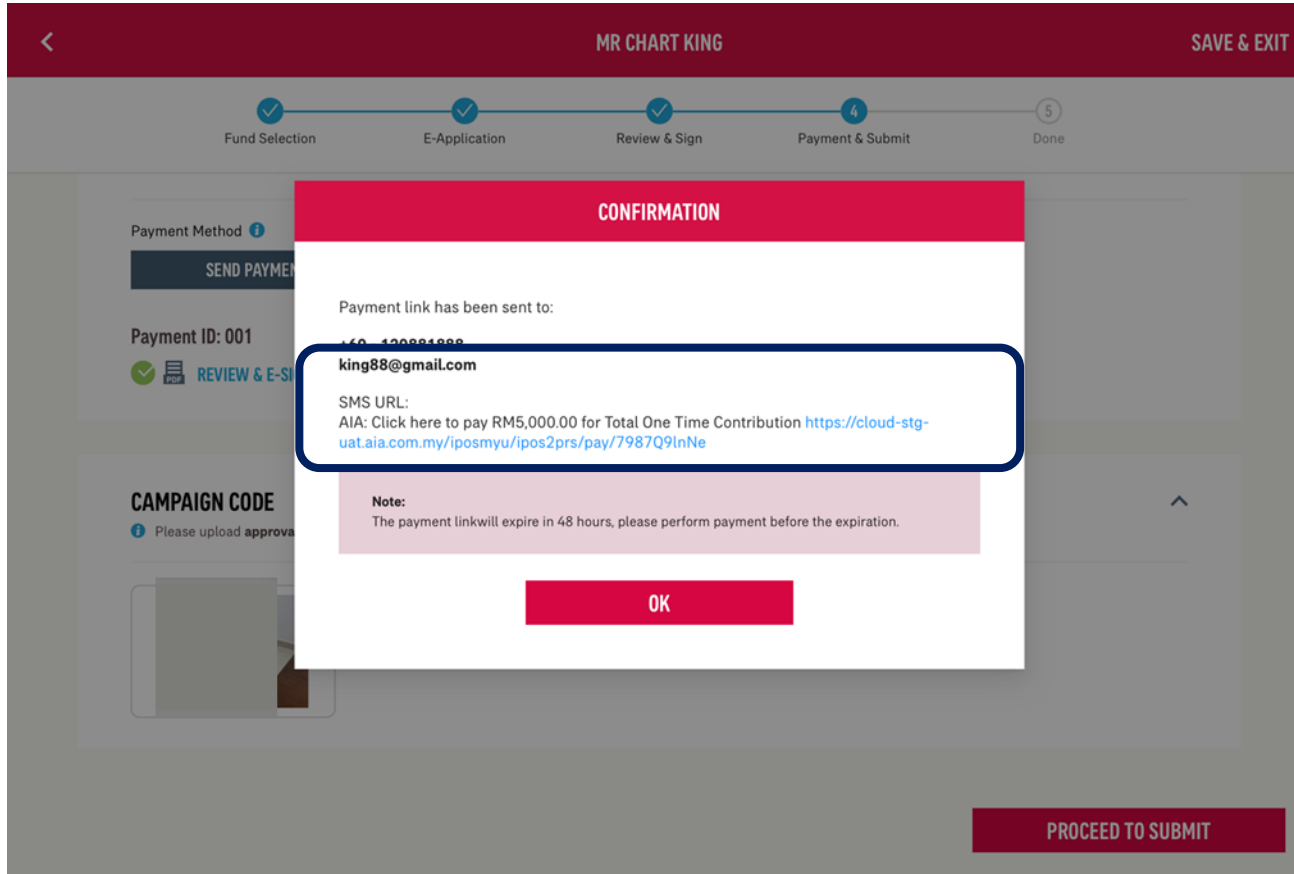
Client's mobile number and email will be displayed.

Click **SEND** for Payment link will be sent to client.

### **Important Note:**

*Payments to be made using the customer's own personal bank account (i.e. not a joint account).*

*Payments made from joint account may require additional documentation (ie. joint account bank statement) as supporting proof.*



Sample of **SMS URL** with Payment Link that will be sent to client.

*Note:*

*If payment link as text instead of a clickable hyperlink, please copy and paste the text into a web browser to proceed with the payment.*

The screenshot shows a web browser window with the URL `dv13.ipay88.com`. The page is titled "Required Information:" and contains two input fields: "Name" and "Email", both with red asterisks indicating they are required. A blue "Submit" button is located below the "Email" field. Below the form, there is a section titled "Available Payment Method" and a table of transaction details. The table has the following content:

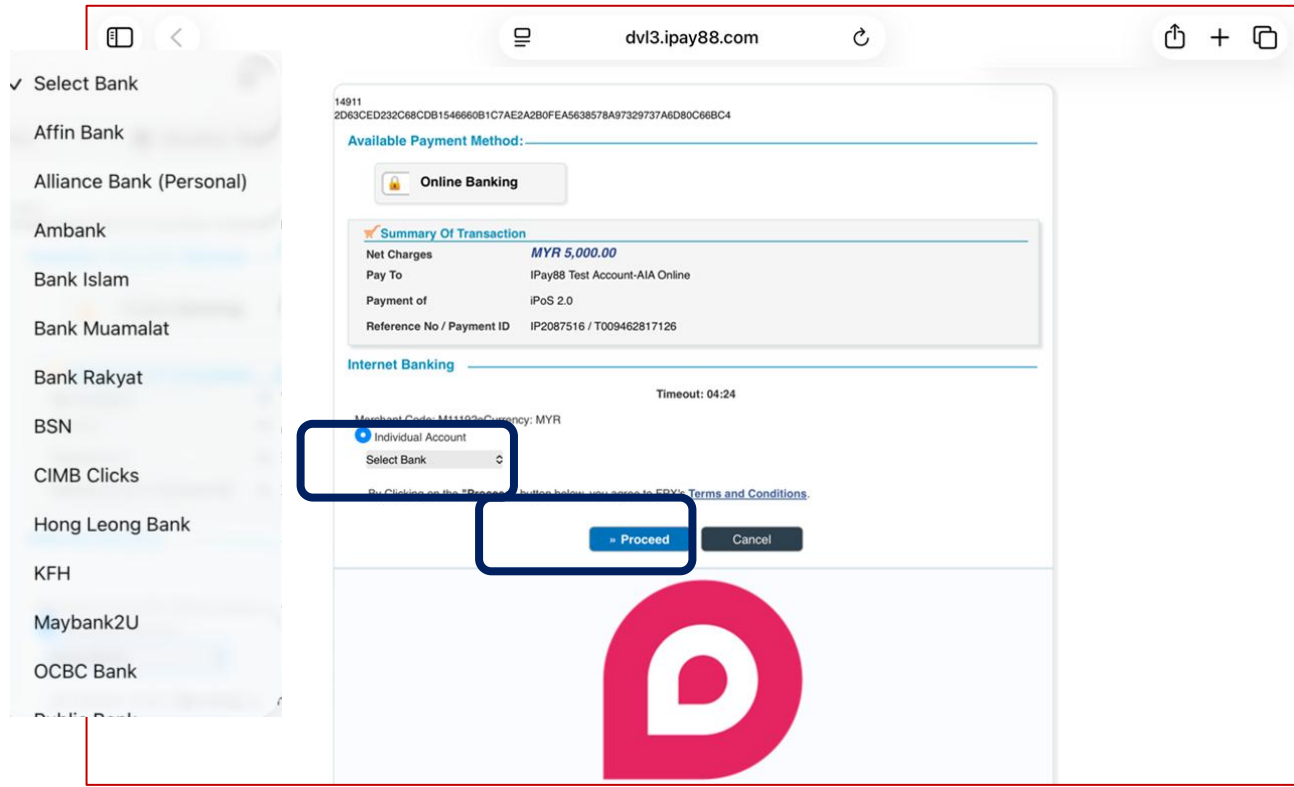
Summary of Transaction	
Net Charge	RM 2,000.00
Pay To	Public Sector Account (PSA) - Public
Payment ID	PSA-000
Reference No / Payment ID	PSA-000-123456789

Below the table, there is a section titled "Internet Banking" with a "Payment Method" dropdown menu. At the bottom of the page, there are "Payment" and "Cancel" buttons.

## Step 5:

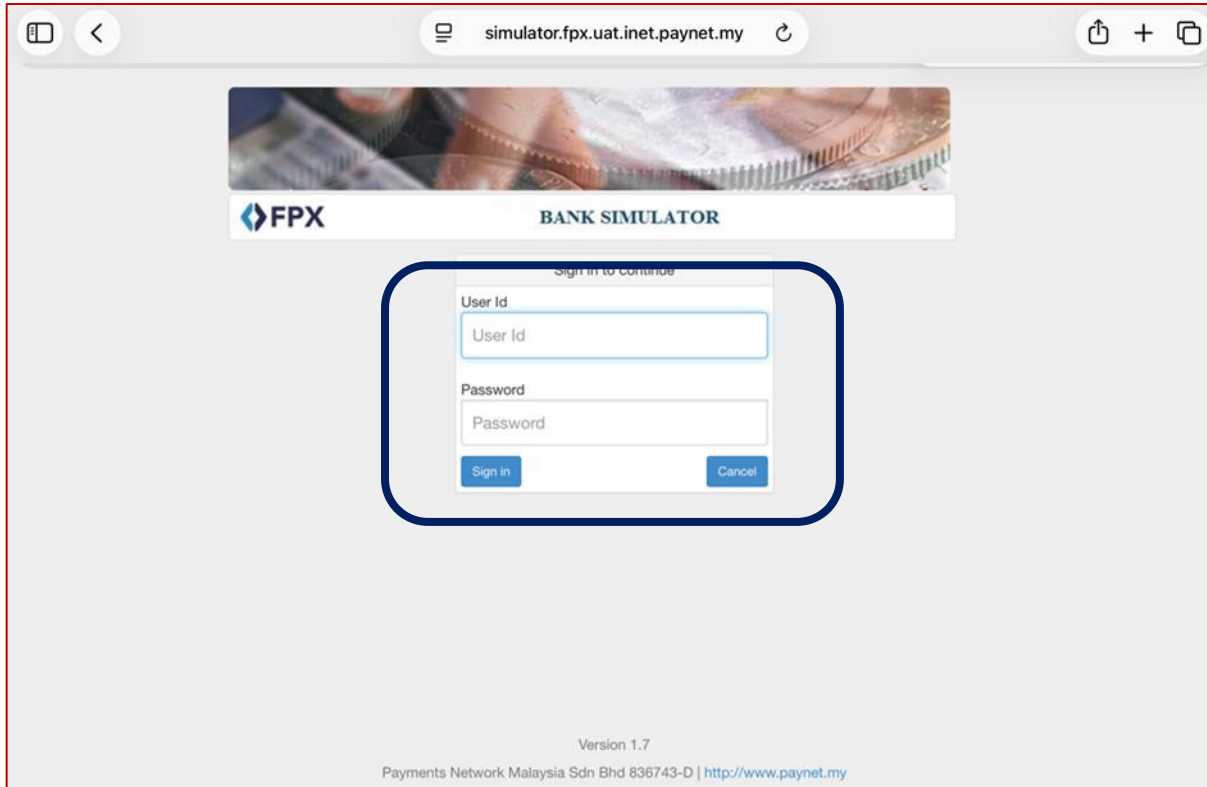
Sample page of Payment Link.

Client to key in Full Name (as per NRIC) and Email.



Step 5.1:  
Client to select bank and click **Proceed** to continue.





## Step 5.2:

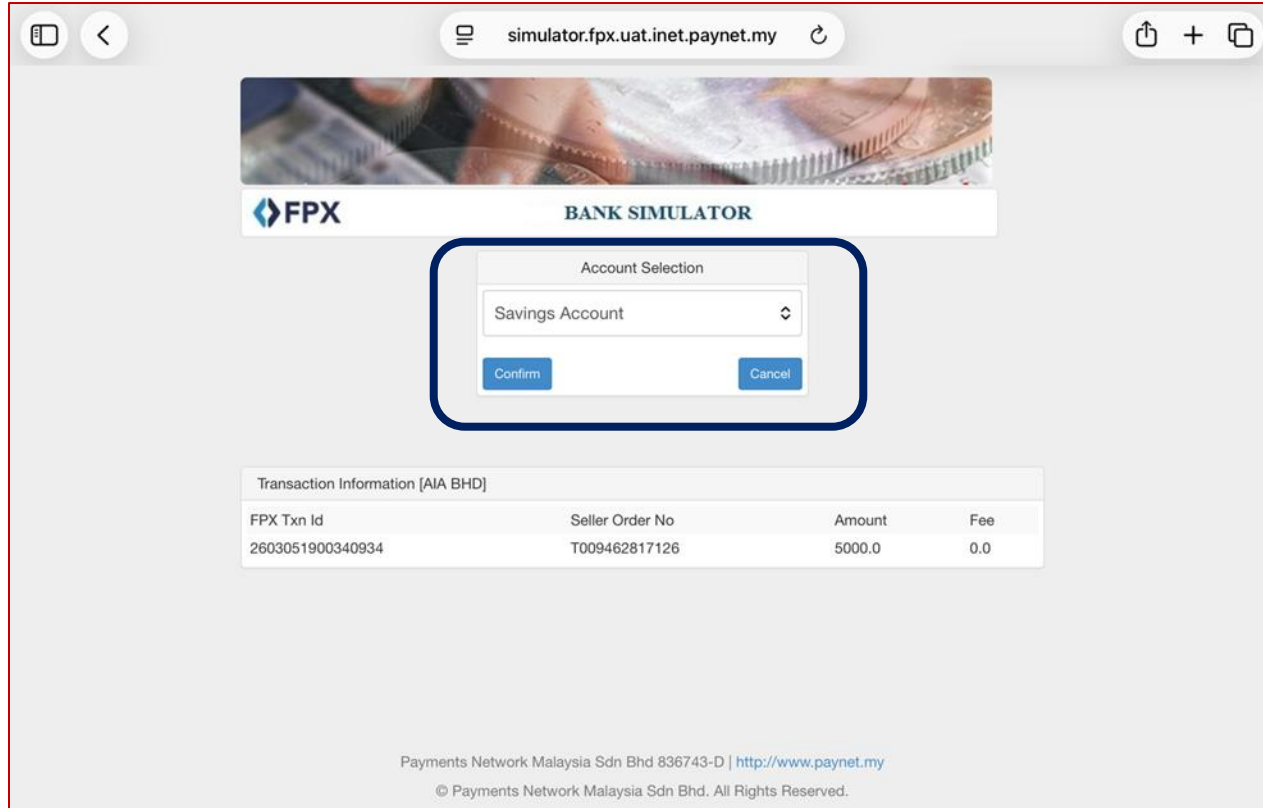
Sample Page of Bank:

Client to log-in to their selected Bank.

### **Important Note:**

*Payments to be made using the customer's own personal bank account (i.e. not a joint account).*

*Payments made from joint account may require additional documentation (ie. joint account bank statement) as supporting proof.*



Step 5.3:  
Client to complete the transaction.



The screenshot displays the FPX Bank Simulator interface. At the top, there is a header with the FPX logo and the text "BANK SIMULATOR". Below the header, a green notification box states "Your account has been deducted". A table titled "Transaction details" provides the following information:

FPX Transaction ID	Seller Order No	Transaction Amount	Fee Amount	Account Type
2603051900340934	T009462817126	5000.0	0.0	Savings Account

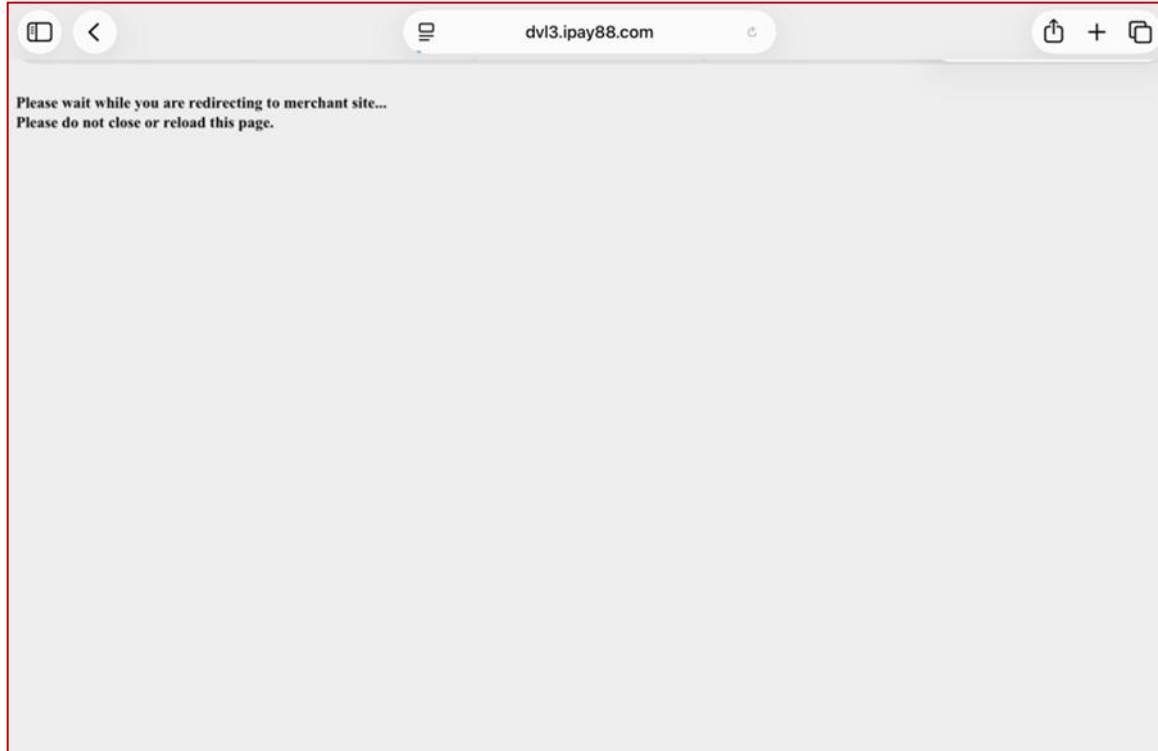
Below the table, an "Important Note" section contains two instructions:

1. This is not the final confirmation of your payment. Please check with your merchant for final status confirmation.
2. Please click on the "Continue with Transaction" button below and DO NOT close the browser until final receipt is displayed.

At the bottom, a "Transaction Status" box shows "Authorisation Result" as "Approved - 00" and a "Continue with Transaction" button, which is highlighted with a blue border.

Step 5.4:

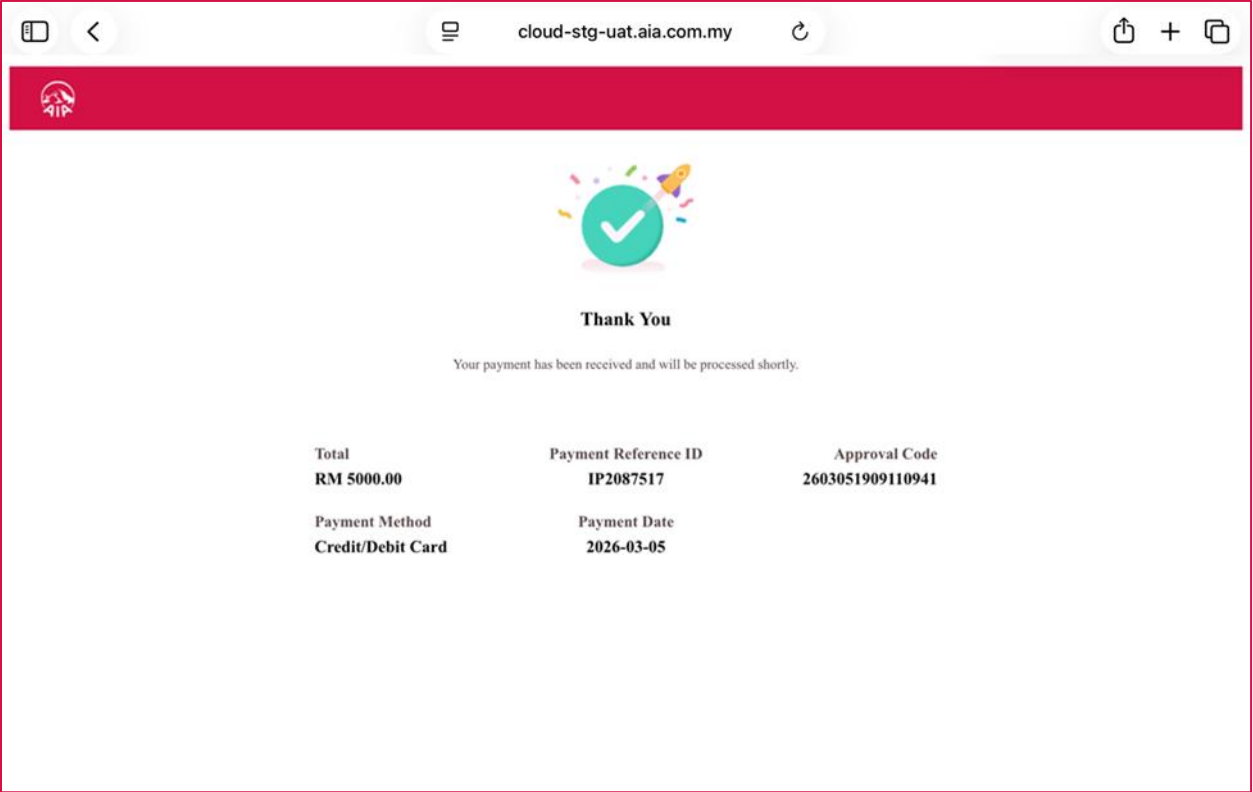
Transaction completed.



Do not close or reload the page.

**Note:**

*Please wait for the page to fully load and redirect you back to the merchant site (i.e. the Thank You page).*



Acknowledgement of payment received.



The screenshot displays the user interface for MR CHART KING. At the top, a progress bar shows five steps: Fund Selection, E-Application, Review & Sign, Payment & Submit, and Done. The 'Payment & Submit' step is currently active. Below the progress bar, a card displays the following information:

- Chart King - EA000007987Q1773058262518** (with a REFRESH button)
- Transaction Type:** New Enrolment
- One-Time Contribution:** AIA PAM - GROWTH FUND, AIA PAM - DIVIDEND INCOME FUND
- Status:** Payment successful and submitted - Paylink (with a green checkmark icon)

A note at the bottom states: "Note: Kindly note that submissions received after 4.00pm will be processed on the next working day." At the bottom of the screen, there are two buttons: "BACK TO PROFILE" and "VIEW SUBMISSIONS".

Payment successfully submitted.

*Note:*

*Cases must be submitted by 4:00 PM to be captured as same-day submissions.*

*Any cases submitted after 4:00 PM will be captured as next working day submissions.*



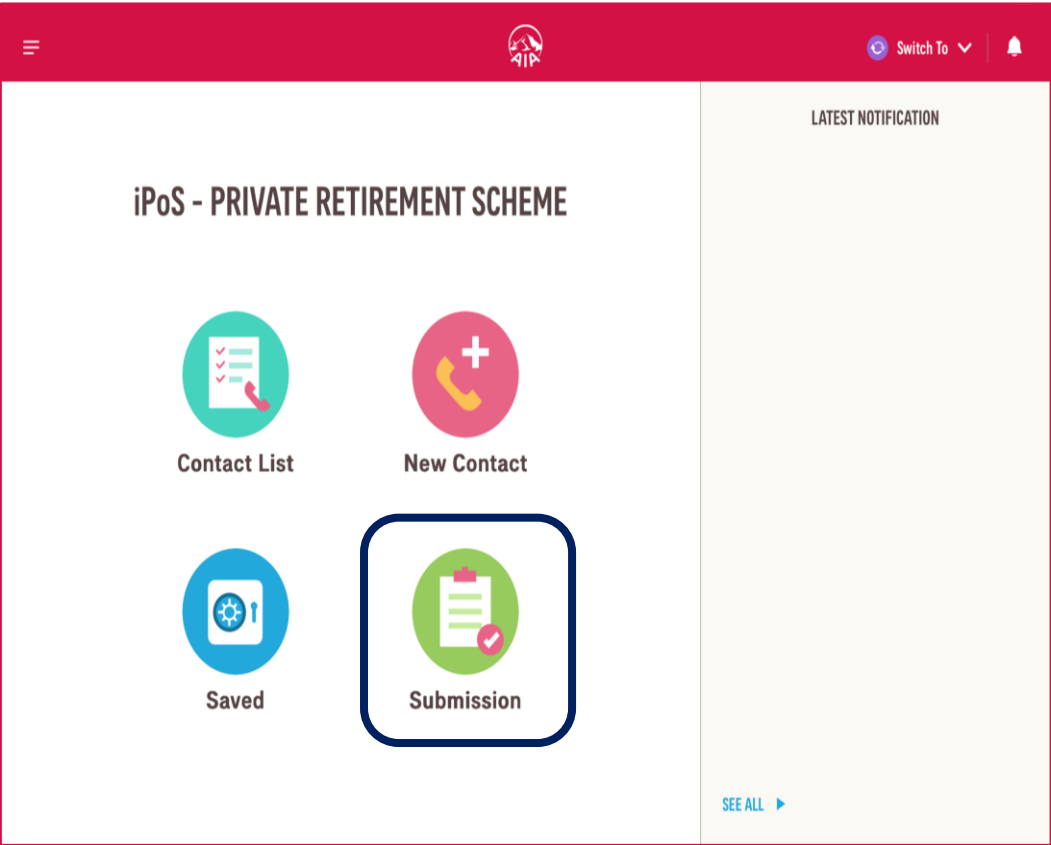


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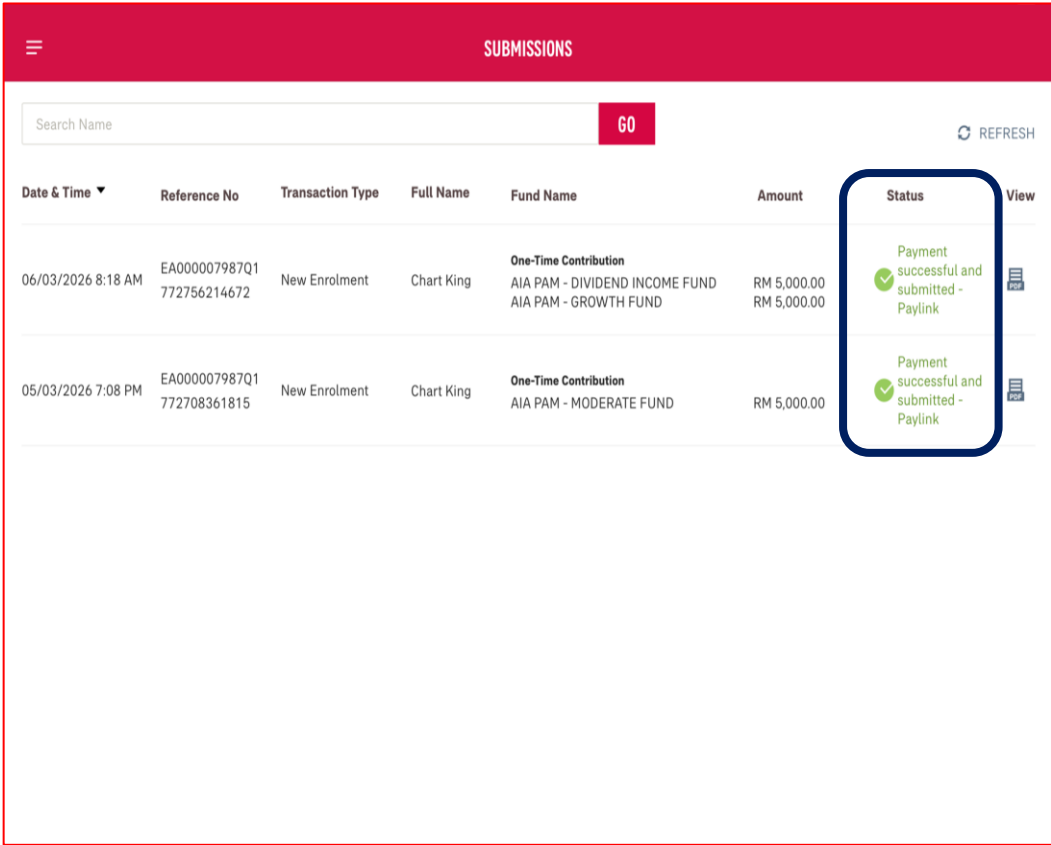
SUBMISSION COMPLETED

# iPOS for PRS

Consultant may view status of submissions at the homepage under **SUBMISSION**.



The homepage features a red header with the AIA logo and a 'Switch To' dropdown. The main content area is titled 'iPoS - PRIVATE RETIREMENT SCHEME' and contains four circular icons: 'Contact List', 'New Contact', 'Saved', and 'Submission'. The 'Submission' icon is highlighted with a blue border. A 'LATEST NOTIFICATION' section is on the right, and a 'SEE ALL' link is at the bottom.



The 'SUBMISSIONS' page has a red header with a search bar and a 'GO' button. Below the header is a table with columns: Date & Time, Reference No, Transaction Type, Full Name, Fund Name, Amount, Status, and View. A 'REFRESH' button is in the top right. The 'Status' column is highlighted with a blue border. The table contains two rows of submission data.

Date & Time	Reference No	Transaction Type	Full Name	Fund Name	Amount	Status	View
06/03/2026 8:18 AM	EA000007987Q1 772756214672	New Enrolment	Chart King	One-Time Contribution AIA PAM - DIVIDEND INCOME FUND AIA PAM - GROWTH FUND	RM 5,000.00 RM 5,000.00	Payment successful and submitted - Paylink	
05/03/2026 7:08 PM	EA000007987Q1 772708361815	New Enrolment	Chart King	One-Time Contribution AIA PAM - MODERATE FUND	RM 5,000.00	Payment successful and submitted - Paylink	

Note: You may click the REFRESH button to update the STATUS.

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# Appendix 1 – Third Party Payment

# iPOS for PRS – Third Party Payment

MR CHART KING

SAVE & EXIT

Fund Selection 1 | E-Application 2 | Review & Sign 3 | Payment & Submit 4 | Done 5

General ✓

One-Time Contribution Payor !

FATCA Declaration !

CRS Declaration !

**SOURCE OF FUND / WEALTH** ✓ | **PAYOR / CONTRIBUTOR DETAILS** !

If you are the Unit Holder, are you also the Payor/Contributor of the One-Time Contribution fund(s)?

YES  NO

**UNIT HOLDER DETAILS**

**Source of Fund \***

Salary / Business income

Sales of assets

Inheritance

Personal savings

Sales of other investments

Others

**Source of Wealth \***

Salary or commission from current and/or past employment

Savings from past employment or business

BACK NEXT

Step 1:

Please click **NO** if the Unit Holder (client) is not the Payor/Contributor (i.e., in the case of third-party payment).

*Note:*

*Clients are strongly encouraged to use their own accounts for contributions rather than third-party payments.*

*Only spouse, parent, and child relationships are allowed for third-party payments.*



# iPOS for PRS – Third Party Payment

Step 2: Please key in the information for the Payor.

MR CHART KING SAVE & EXIT

Fund Selection  E-Application  Review & Sign  Payment & Submit  Done

General  One-Time Contribution Payor  FATCA Declaration  CRS Declaration

**SOURCE OF FUND / WEALTH**  **PAYOR / CONTRIBUTOR DETAILS**

Industry: Architectural

MOBILE NO.: +60 125557878

Email Address\*: lilian88@gmail.com

Relationship with Unit Holder\*: **Spouse**

Use Unit Holder's Address

Correspondence Address 1\*: Please Input

Correspondence Address 2: Please Input

Correspondence Address 3: Please Input

Correspondence Address 4: Please Input

Please complete this mandatory field

**BACK** **NEXT**

MR CHART KING SAVE & EXIT

Fund Selection  E-Application  Review & Sign  Payment & Submit  Done

General  One-Time Contribution Payor  FATCA Declaration  CRS Declaration

**SOURCE OF FUND / WEALTH**  **PAYOR / CONTRIBUTOR DETAILS**

Use Unit Holder's Address

Correspondence Address 1\*: 9 Jalan SL 1

Correspondence Address 2: Bandar SL

Correspondence Address 3: Please Input

Correspondence Address 4: Please Input

Postcode\*: 43200

City\*: Batu 9 Cheras

State\*: W.P Kuala Lumpur

Country\*: MALAYSIA

**BACK** **NEXT**



# iPOS for PRS

Step 2.1: Upon completion, please click **NEXT**.

MR CHART KING

SAVE & EXIT

Fund Selection 1 | E-Application 2 | Review & Sign 3 | Payment & Submit 4 | Done 5

General

One-Time Contribution Payor

FATCA Declaration

CRS Declaration

**SOURCE OF FUND / WEALTH**

**Source of Fund\***

- Salary / Business income
- Sales of assets
- Inheritance
- Personal savings

**Source of Wealth\***

- Salary or commission from current and/or past employment
- Sales of investments (shares / unit trusts etc.)
- Business or trade income
- Sales of assets

**PAYOR / CONTRIBUTOR DETAILS**

- Sales of other investments
- Others
- Savings from past employment or business
- Rental income
- Inheritance or gift
- Others

I, being the unit holder, hereby confirm that the payment made by the Payor on my behalf is for the purpose of contributing towards the PRS fund(s) selected by myself and the Payor does not exercise trading authority over my account.

BACK NEXT

MR CHART KING

SAVE & EXIT

Fund Selection 1 | E-Application 2 | Review & Sign 3 | Payment & Submit 4 | Done 5

General

One-Time Contribution Payor

FATCA Declaration

CRS Declaration

**SOURCE OF FUND / WEALTH**

**Source of Fund\***

- Salary / Business income
- Sales of assets
- Inheritance
- Personal savings

**Source of Wealth\***

- Salary or commission from current and/or past employment
- Sales of investments (shares / unit trusts etc.)
- Business or trade income
- Sales of assets

**PAYOR / CONTRIBUTOR DETAILS**

- Savings from past employment or business
- Rental income
- Inheritance or gift
- Others

I, being the unit holder, hereby confirm that the payment made by the Payor on my behalf is for the purpose of contributing towards the PRS fund(s) selected by myself and the Payor does not exercise trading authority over my account.

I/We understand and agree that any personal information collected or held by AIA Pension and Asset Management Sdn. Bhd. (hereinafter referred to as APAM) may be used and disclosed by APAM to individuals/organisations related to and associated with APAM or any selected third party (within or outside of Malaysia, including but not limited to regulators/authorities, industry associations/federations and credit reporting agencies) for the purpose of (a) processing this form; (b) providing subsequent service; (c) for AIA data matching; and (d) 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 APAM concerning me/us. Such request can be made to any of AIA's Customer Service Centres.

**Important Notes**

APAM may review and/or update the Privacy Statement from time to time to reflect the changes in laws and/or APAM's internal policy. For more information in relation to the manner APAM deals with personal data, please refer to the latest Privacy Statement on our website at [www.aia-prs.com.my](http://www.aia-prs.com.my).

BACK NEXT

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# iPOS for PRS

Note: the **PAYOR** is also required to provide copy of NRIC and Signature as part of submission process.

The screenshot shows the 'MR CHART KING' application form at the 'Review & Sign' stage. A progress bar at the top indicates five steps: Fund Selection, E-Application, Review & Sign (current), Payment & Submit, and Done. The form includes a 'CHART KING' logo and an important notice: 'IMPORTANT: Please make sure the client has viewed ALL documents and agreed to the T&Cs before proceeding to e-signature.' Below this, a checkbox is checked with the text 'I hereby verify that I have sighted the original document provided by the client.' The 'ONE-TIME CONTRIBUTION PAYOR' section contains the following details:

Full Name	ID Type	ID Number	Nationality	Gender
Lilian Lee	New IC	900909-14-5512	MALAYSIAN	Female

Below the table, there are two photo upload buttons: 'New IC Front' and 'New IC Back', both with camera icons. A checkbox below these buttons is checked with the text 'I hereby verify that I have sighted the original document provided by the client.' At the bottom, there is a 'DECLARATION AND SIGNATURE' section with a 'REVIEW & E-SIGN' button and a 'PROCEED' button.

The screenshot shows the signature capture screen. It contains a list of terms and conditions:

- a) Allowed me sufficient time to review and provide the necessary information required in this form;
- b) Explained the available communication methods and offered to provide details in an alternative format such as post or email for better clarity; and
- c) Confirmed whether I would like to consult someone else first or have someone present with me when receiving advice.

Below the terms, there is a paragraph starting with 'i) I understand and agree that any personal information collected or held by AIA Pension and Asset Management Sdn. Bhd. (hereinafter referred to as "APAM") may be used and disclosed by APAM to individuals/organisations related to and associated with APAM or any selected third party (within or outside of Malaysia, including but not limited to regulators/authorities, industry associations/federations and credit reporting agencies) for the purpose of (a) processing this form; (b) providing subsequent service; (c) for AIA data matching; and (d) for regulatory and/or statutory compliance purposes. I understand that I/we have the right to obtain access to and to request correction of any personal information held by APAM concerning me/us. Such request can be made to any of AIA's Customer Service Centres. For more information in relation to the manner APAM deals with personal data, please refer to the latest Privacy Statement on our website at www.aia-prs.com.my. APAM may review and/or update the Privacy Statement from time to time to reflect the changes in laws and/or APAM's internal policy.'

There are four signature capture boxes, each with a timestamp '06/03/2026 08:16:XX':

- Signature of Consultant: WOFW YXX EHFYFF (Signature: C)
- Signature of Unit Holder: Chart King (Signature: C)
- Signature of One-Time Contribution Payor: Lilian Lee (Signature: A)
- Signature of Direct Debit Payor: (Empty box)



# iPOS for PRS

*Note: PAYMENT LINK will be sent to PAYOR rather than to the UNIT HOLDER.*

The screenshot shows the 'MR CHART KING' interface with a progress bar at the top indicating steps: Fund Selection, E-Application, Review & Sign, Payment & Submit (current), and Done. The main content area displays 'TOTAL PAYABLE AMOUNT RM 10,000.00' and 'PAYMENT DETAILS'. A 'CONFIRMATION' dialog box is overlaid, asking 'Payment link will be send to:' with input fields for phone number (+60 125557878) and email (lilian88@gmail.com). Below the input fields is an 'Important Notice' stating: 'Submission will be pending until payment is successfully completed via payment link. Please note that only current and saving account of NON-ELDER UNIT HOLDER is allowed for contribution payment.' The dialog has 'CANCEL' and 'SEND' buttons.

The screenshot shows the same 'MR CHART KING' interface. The 'CONFIRMATION' dialog box now displays the following information: 'Payment link has been sent to: +60 - 125557878, lilian88@gmail.com'. It also provides the 'SMS URL: AIA: Click here to pay RM10,000.00 for Total One Time Contribution https://cloud-stg-uat.aia.com.my/iposmyu/ipos2prs/pay/7987QWNPC5'. A 'NOTE' at the bottom states: 'The payment link will expire in 48 hours, please perform payment before the expiration.' The dialog has an 'OK' button.





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## Appendix 2 – REMOTE SIGN

# iPOS for PRS – REMOTE SIGN

MR CHART KING SAVE & EXIT

Fund Selection E-Application Review & Sign Payment & Submit Done

**CHART KING**

IMPORTANT: Please make sure the client has viewed ALL documents and agreed to the T&Cs before proceeding to e-signature.

✔ EAPP **One-Time Contribution** EDIT  
AIA PAM - DIVIDEND INCOME FUND: **RM 5,000.00**  
AIA PAM - GROWTH FUND: **RM 5,000.00**  
Date Created: **08/03/2026 9:35 AM**

✔ PRODUCT HIGHLIGHTS SHEET Core Funds   
Non-Core Funds

✔ DISCLOSURE DOCUMENT

! CLIENT SIGNATURE

! DOCUMENTS

BACK PROCEED

Step 1:

For **REMOTE SIGN**, please click accordingly to proceed.

# iPOS for PRS – REMOTE SIGN

MR CHART KING

SAVE & EXIT

Fund Selection E-Application **Review & Sign** Payment & Submit Done

**REMOTE SIGN**

I have met the unit holder, payor in person and verified their identity and details.

NO  YES

An email & SMS will be send to the following for remote signature.

+60 120881888  
king88@gmail.com

CANCEL **CONFIRM**

DISCLOSURE DOCUMENT

CLIENT SIGNATURE

DOCUMENTS

BACK PROCEED

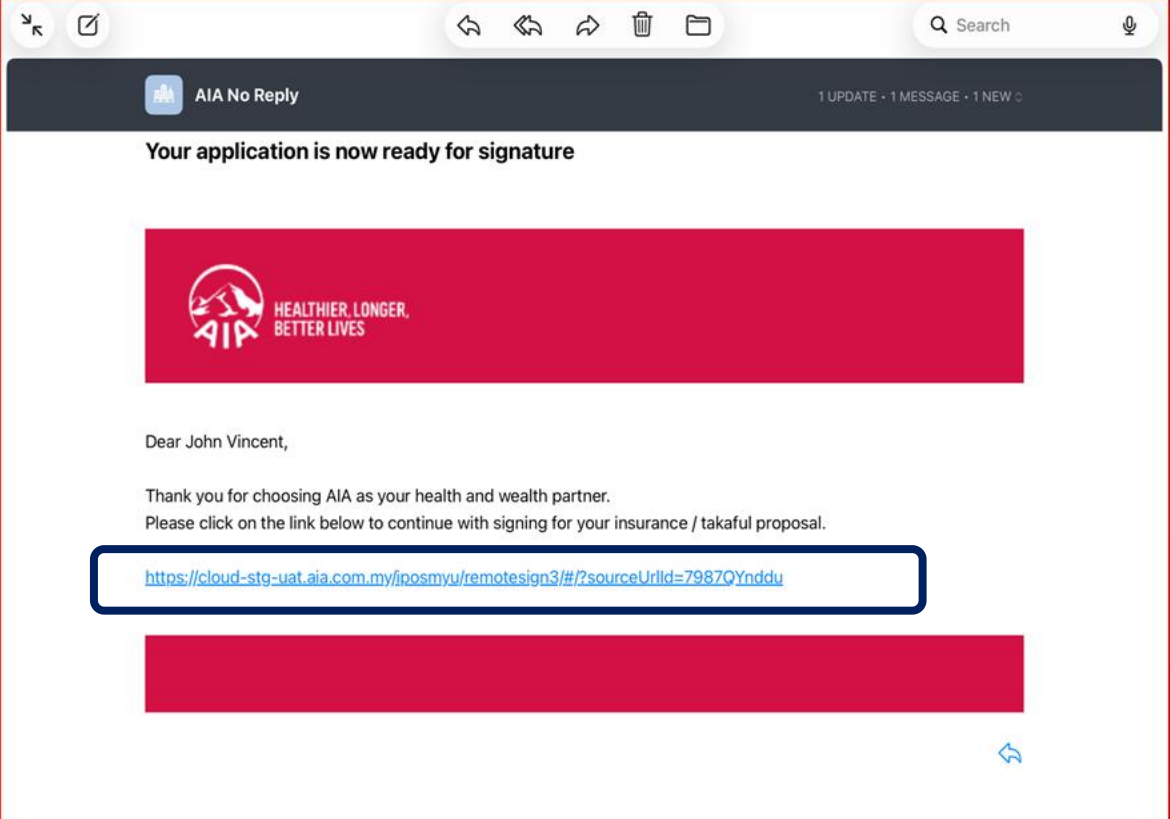
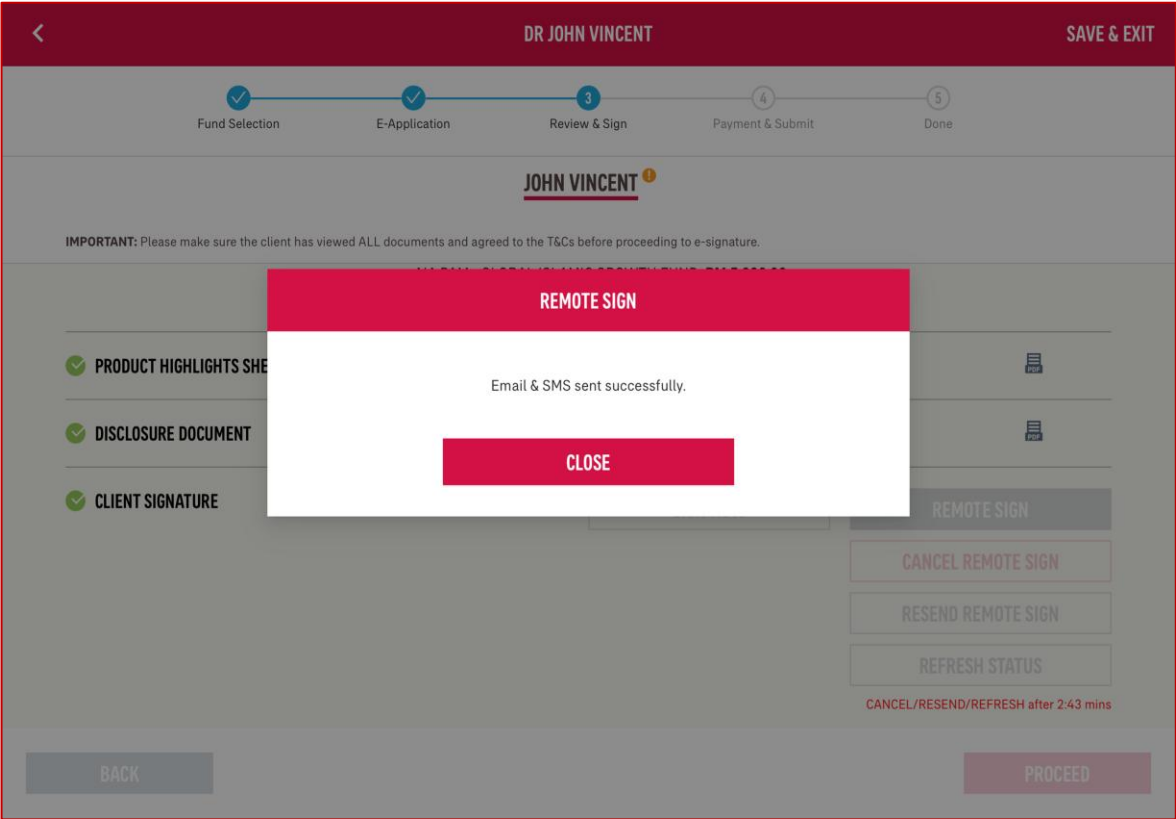
## Step 2:

Consultant to click **YES** as declaration of having met the client in person and has verified their identity and details.

An email and SMS will be sent to the client to proceed with **REMOTE SIGN**.

# iPOS for PRS

Step 3:  
Customer to access their personal email for further action.



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# iPOS for PRS

## Step 4:

Enter password (DDMMYY + Last 4 Digits of NRIC). Please click SUBMIT, TICK and AGREE to proceed.

The screenshot shows a web browser window with the URL 'cloud-stg-uat.aia.com.my'. The page has a red header with the AIA logo. The main content area is titled 'Remote Authentication'. Below the title, there is a paragraph: 'Please enter your password in the following format to proceed.' followed by the instruction 'DDMMYY + Last 4 Digits of your NRIC' and an example: 'e.g if you are born on 8 Nov 1980 and your NRIC is 801108-14-5234, your password will be "0811805234"'. A text input field contains the password '0808955517'. At the bottom, there is a large red button labeled 'SUBMIT'.

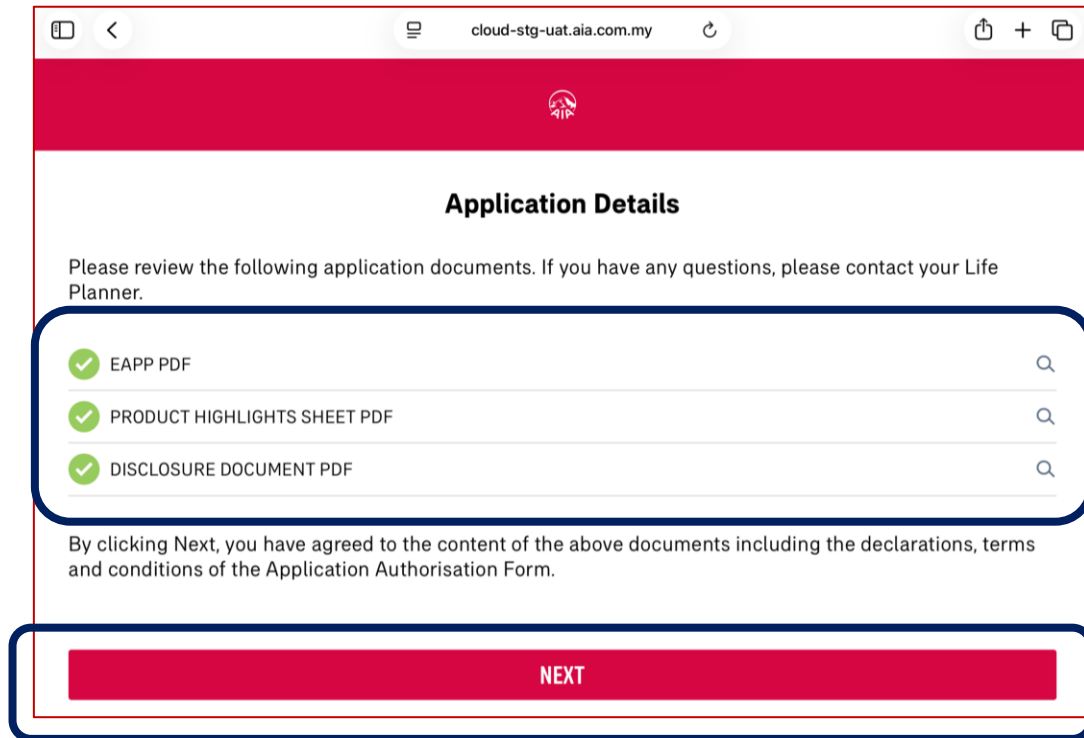
The screenshot shows a web browser window with the URL 'cloud-stg-uat.aia.com.my'. The page has a red header with the AIA logo. The main content area is titled 'Customer Information'. It contains three sections: 'Consultant's Details' with the value 'WOFW YXX EHFYFF 7987Q', 'Unit Holder / One Time Contribution Payor' with the value 'John Vincent', and 'Fund Name' with the values 'AIA PAM - GLOBAL ISLAMIC GROWTH FUND' and 'AIA PAM - DYNAMIC ASIA EX-JAPAN FUND'. Below these sections, there is a checkbox that is checked, with the text 'I/we confirm that the above details are accurate.'. At the bottom, there are two buttons: a grey button labeled 'DISAGREE' and a red button labeled 'AGREE'.

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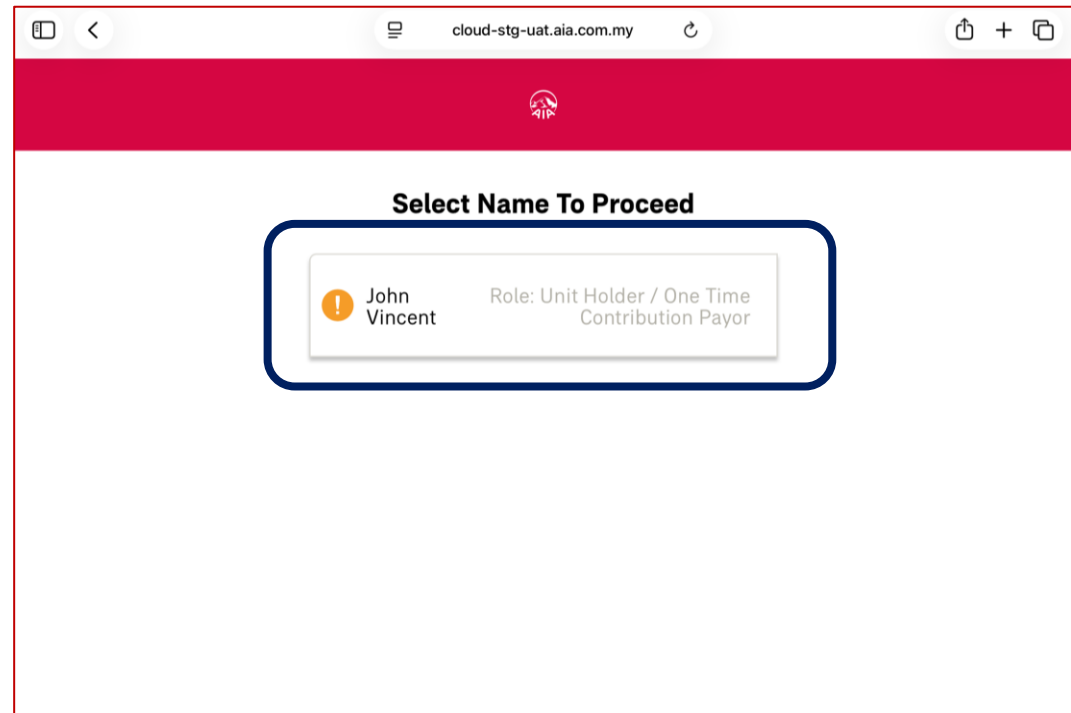
# iPOS for PRS

## Step 5:

Customer to review each of the documents.



The screenshot shows a web browser window with the URL 'cloud-stg-uat.aia.com.my'. The page has a red header with the AIA logo. The main content area is titled 'Application Details'. Below the title, there is a paragraph: 'Please review the following application documents. If you have any questions, please contact your Life Planner.' A list of three documents is displayed, each with a green checkmark icon and a magnifying glass icon: 'EAPP PDF', 'PRODUCT HIGHLIGHTS SHEET PDF', and 'DISCLOSURE DOCUMENT PDF'. Below the list, there is a paragraph: 'By clicking Next, you have agreed to the content of the above documents including the declarations, terms and conditions of the Application Authorisation Form.' At the bottom of the page, there is a large red button labeled 'NEXT'.

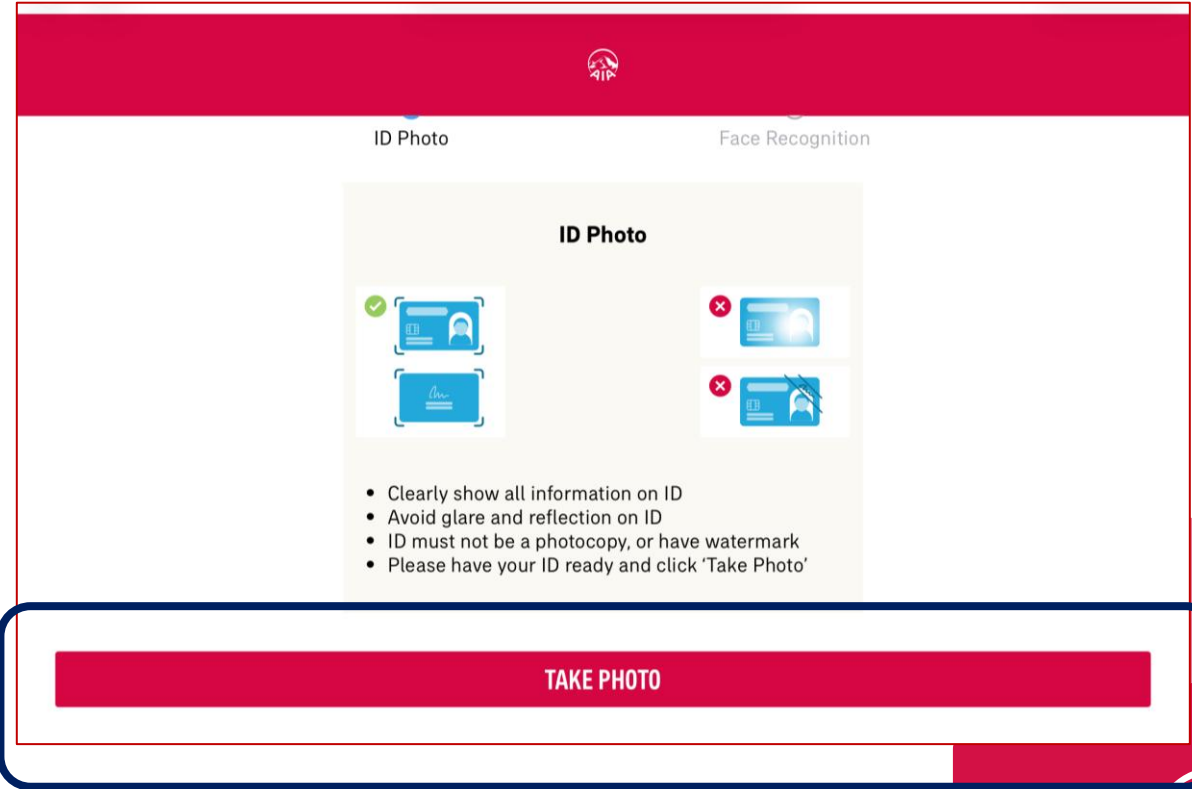
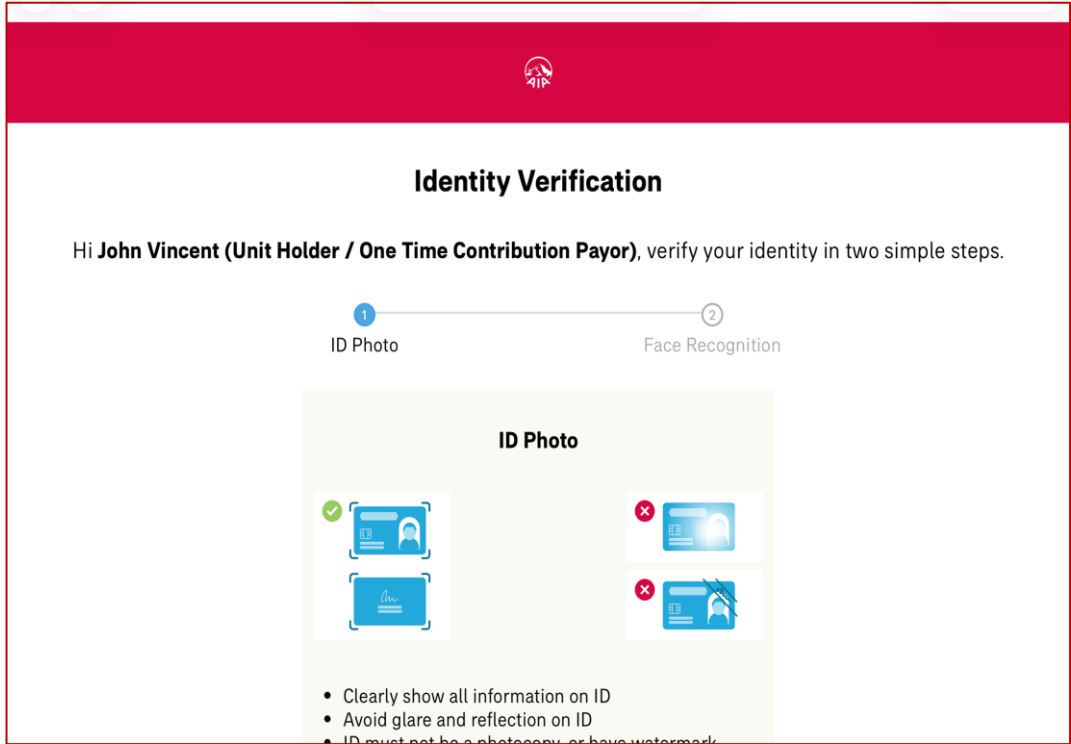


The screenshot shows a web browser window with the URL 'cloud-stg-uat.aia.com.my'. The page has a red header with the AIA logo. The main content area is titled 'Select Name To Proceed'. Below the title, there is a rounded rectangular box containing a selection card. The card has a yellow warning icon on the left, followed by the name 'John Vincent' and the role 'Role: Unit Holder / One Time Contribution Payor'.

# iPOS for PRS

## Step 6:

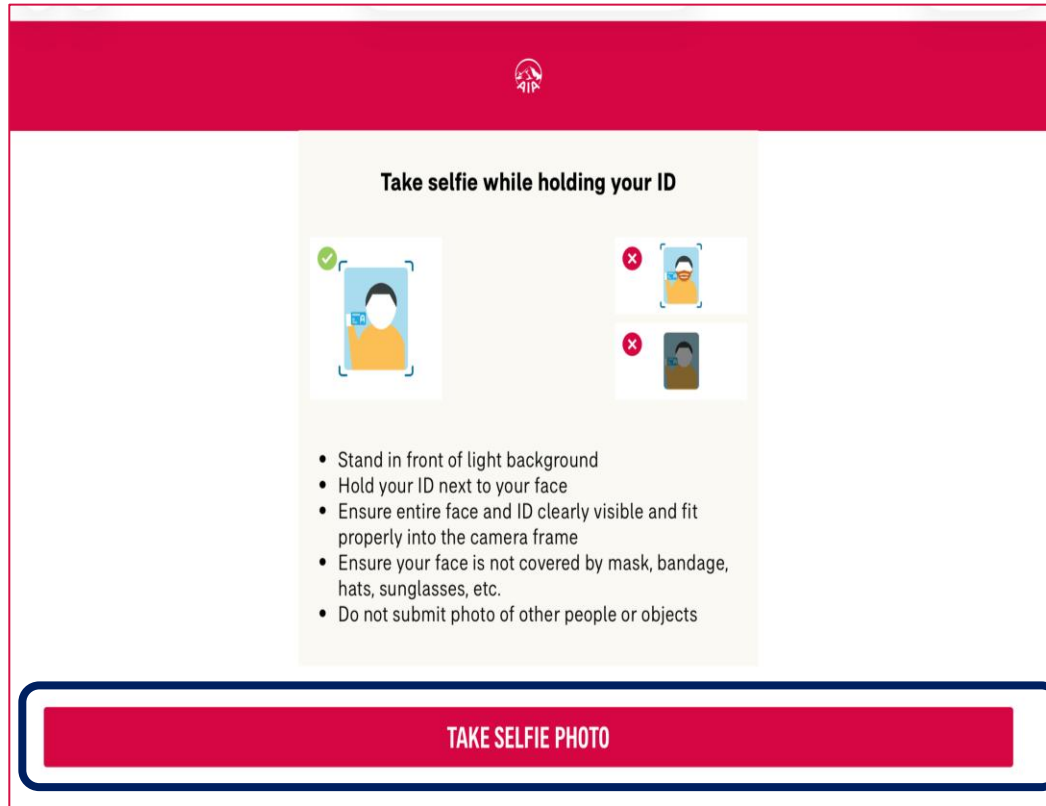
Customer to upload copy of NRIC for verification.



# iPOS for PRS

## Step 7:

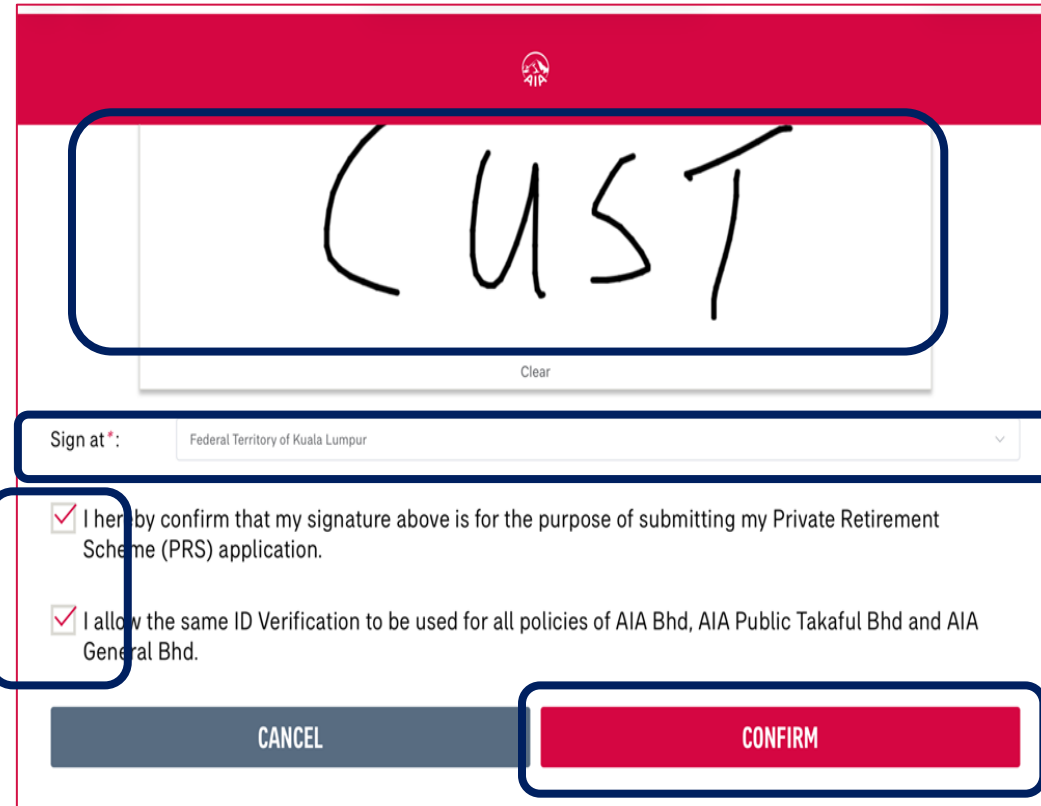
Customer to upload Selfie and complete the Remote Sign process.



The screenshot shows a mobile application interface with a red header containing the AIA logo. The main content area is titled "Take selfie while holding your ID". It features two columns of images: the left column shows a correct selfie with a green checkmark, and the right column shows two incorrect examples with red 'X' marks. Below the images is a list of instructions:

- Stand in front of light background
- Hold your ID next to your face
- Ensure entire face and ID clearly visible and fit properly into the camera frame
- Ensure your face is not covered by mask, bandage, hats, sunglasses, etc.
- Do not submit photo of other people or objects

At the bottom of the screen, there is a large red button with the text "TAKE SELFIE PHOTO".



The screenshot shows a mobile application interface with a red header containing the AIA logo. The main content area is a white box with a blue border containing the handwritten text "CUST". Below this box is a "Clear" button. Underneath is a dropdown menu labeled "Sign at:" with "Federal Territory of Kuala Lumpur" selected. Below the dropdown are two checked checkboxes:

- I hereby confirm that my signature above is for the purpose of submitting my Private Retirement Scheme (PRS) application.
- I allow the same ID Verification to be used for all policies of AIA Bhd, AIA Public Takaful Bhd and AIA General Bhd.

At the bottom of the screen, there are two buttons: a grey "CANCEL" button and a red "CONFIRM" button.

*Note: Please remind client to take selfie based on the instruction provided.*

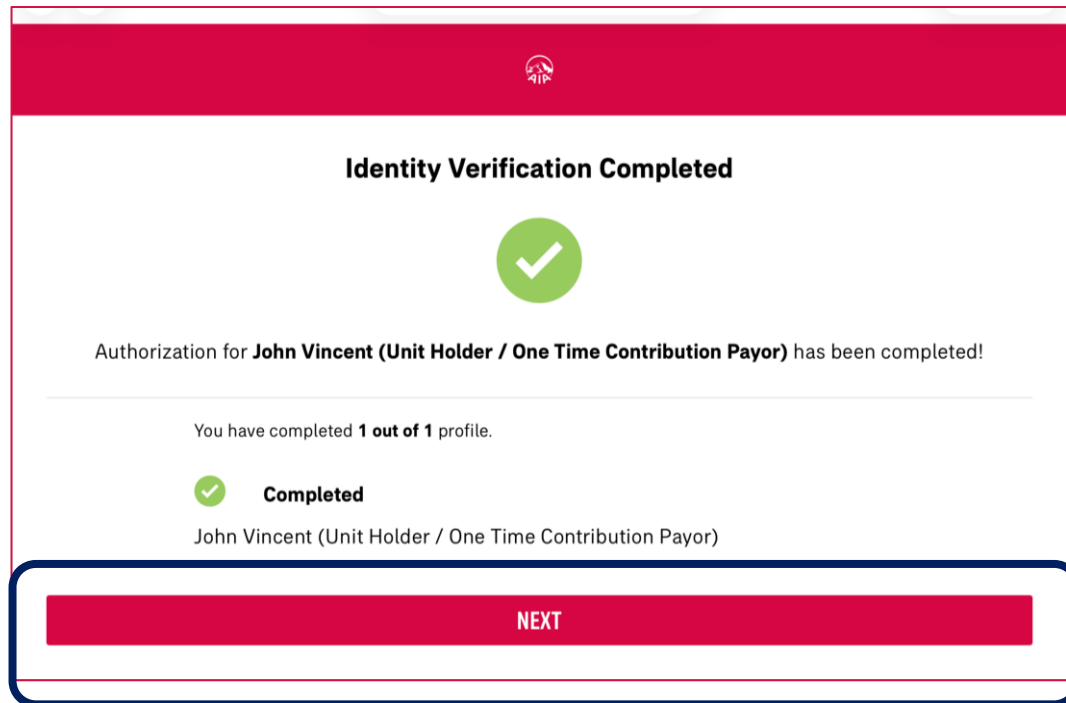
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# iPOS for PRS

Step 8:

Verification completed. Click NEXT to proceed.



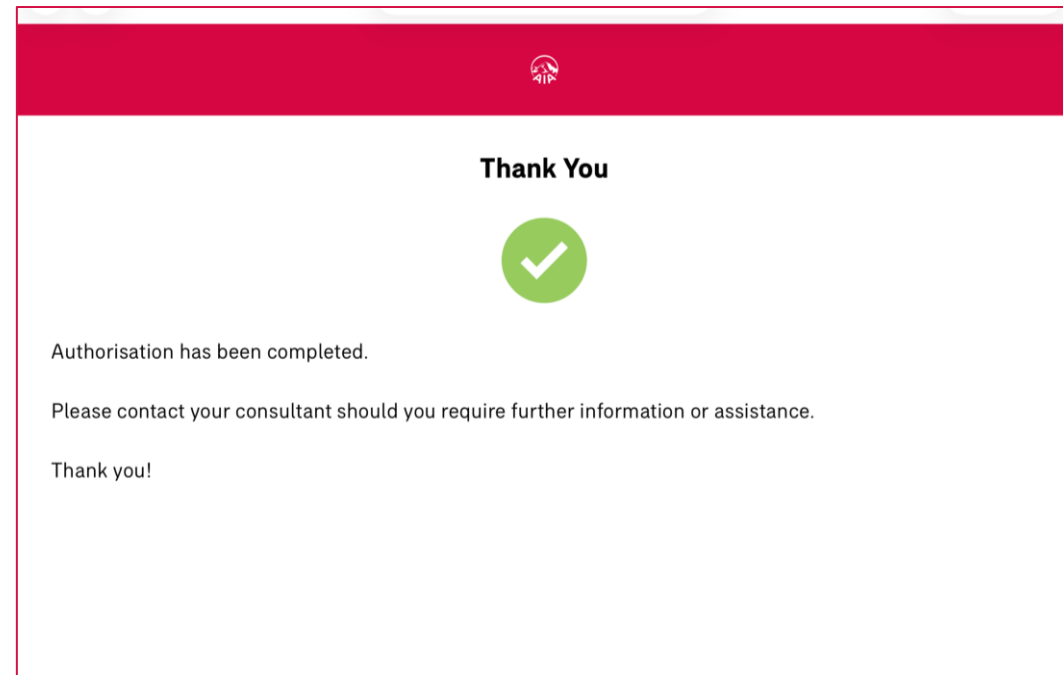
**Identity Verification Completed**

Authorization for **John Vincent (Unit Holder / One Time Contribution Payor)** has been completed!

You have completed **1 out of 1** profile.

**Completed**  
John Vincent (Unit Holder / One Time Contribution Payor)

**NEXT**



**Thank You**

Authorisation has been completed.

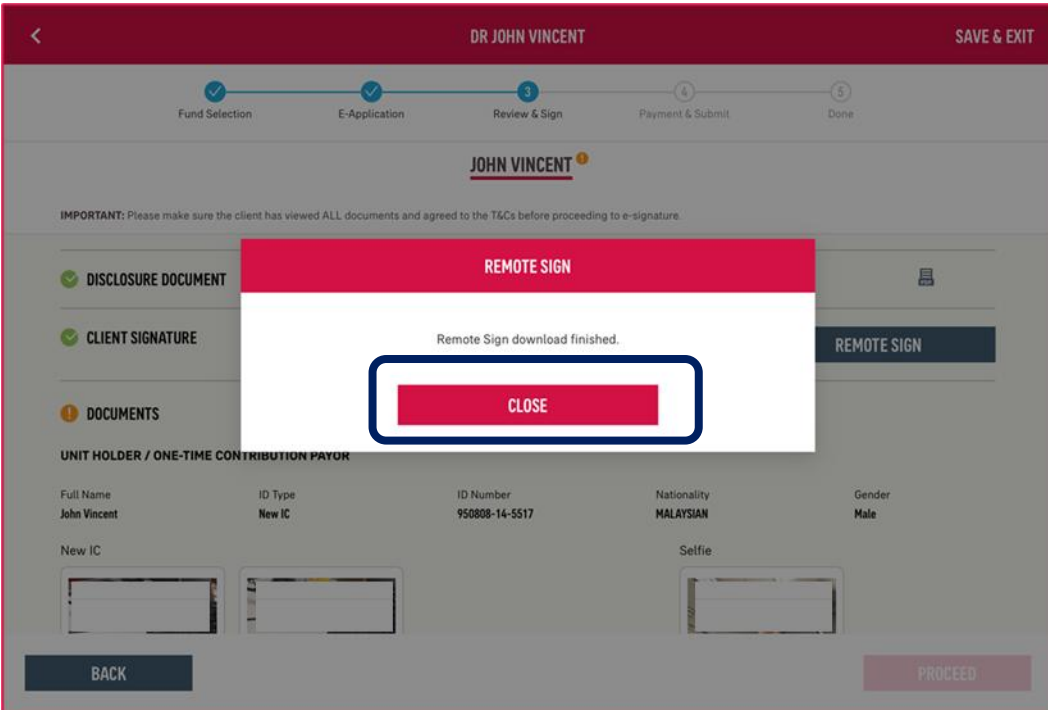
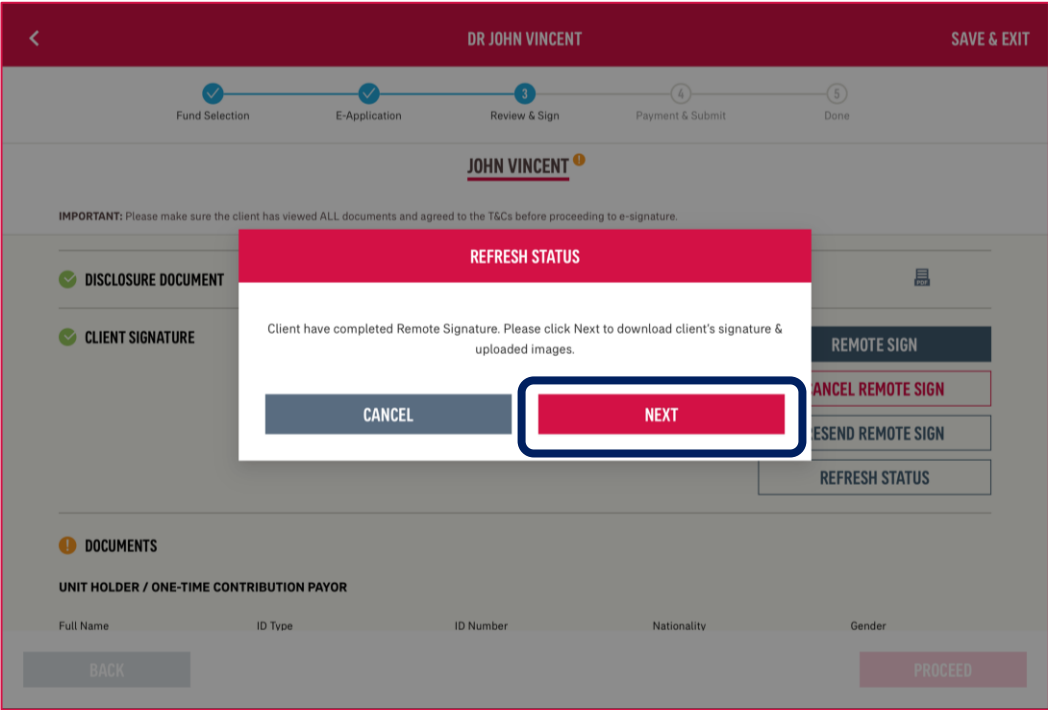
Please contact your consultant should you require further information or assistance.

Thank you!

# iPOS for PRS

## Step 9:

Verification completed. Click NEXT to proceed.



# iPOS for PRS

## Step 10:

Please proceed with Declaration and Signature to complete the process.

DR JOHN VINCENT

SAVE & EXIT

Fund Selection E-Application **Review & Sign** Payment & Submit Done

**JOHN VINCENT**

IMPORTANT: Please make sure the client has viewed ALL documents and agreed to the T&Cs before proceeding to e-signature.

Full Name	ID Type	ID Number	Nationality	Gender
John Vincent	New IC	950808-14-5517	MALAYSIAN	Male

New IC Selfie

I hereby verify that I have sighted the original document provided by the client.

**DECLARATION AND SIGNATURE** Please review details to perform signature [REVIEW & E-SIGN](#)

I acknowledge that I have read and accepted all the terms and conditions set forth herein and confirm that all the declarations are true and correct.

BACK PROCEED

Done

c) Confirmed whether I would like to consult someone else first or have someone present with me when receiving advice.

i) I understand and agree that any personal information collected or held by AIA Pension and Asset Management Sdn. Bhd. (hereinafter referred to as "APAM") may be used and disclosed by APAM to individuals/organisations related to and associated with APAM or any selected third party (within or outside of Malaysia, including but not limited to regulators/authorities, industry associations/federations and credit reporting agencies) for the purpose of (a) processing this form; (b) providing subsequent service; (c) for AIA data matching; and (d) for regulatory and/or statutory compliance purposes. I understand that I/we have the right to obtain access to and to request correction of any personal information held by APAM concerning me/us. Such request can be made to any of AIA's Customer Service Centres. For more information in relation to the manner APAM deals with personal data, please refer to the latest Privacy Statement on our website at [www.aia-prs.com.my](http://www.aia-prs.com.my). APAM may review and/or update the Privacy Statement from time to time to reflect the changes in laws, regulations, industry practices and standards.

Signature of Consultant  
10/03/2026 06:55:47  
WOFW YXX EHFYFF

Signature of Unit Holder  
10/03/2026 06:54:17  
John Vincent  
Federal Territory of Kuala Lumpur

Signature of One-Time Contribution Payor

Signature of Direct Debit Payor



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## Appendix 3 – Direct Pay (Submission via Cheque)

# iPOS for PRS

## Step 1:

For payment via cheque, please click DIRECT PAY.

The screenshot displays the payment interface for DR JOHN VINCENT. At the top, there is a navigation bar with a back arrow, the name 'DR JOHN VINCENT', and a 'SAVE & EXIT' button. Below this is a progress indicator with five steps: Fund Selection (checked), E-Application (checked), Review & Sign (checked), Payment & Submit (active), and Done (disabled). The main content area shows a 'TOTAL PAYABLE AMOUNT' of RM 105,000.00. Under the heading 'PAYMENT DETAILS AND UPLOAD RECEIPT', there is a 'Payment Method' section with two options: 'SEND PAYMENT LINK' and 'DIRECT PAY'. The 'DIRECT PAY' option is highlighted with a blue rounded rectangle. Below this, the 'Payment ID: 001' is displayed, along with a warning icon and a link to 'REVIEW & E-SIGN PAYMENT FORM'. A message states 'Please fill in the payment details and upload the receipt.' There is a 'Type\*' dropdown menu currently set to 'Please Select'. Below the dropdown, there are input fields for 'Bank Name\*', 'Cheque / Bank Draft No.\*', and 'Amount (RM)\*'. At the bottom right, there is a 'PROCEED TO SUBMIT' button.

### Note:

*The minimum amount allowed for DIRECT PAY is **RM30,001**.*

# iPOS for PRS

## Step 2:

Key in details of the payment.

DR JOHN VINCENT

SAVE & EXIT

Fund Selection E-Application Review & Sign Payment & Submit Done

Please fill in the payment details and upload the receipt.

Type \*

Please Select

Please select Type

Bank Name \*

Please Select

Please select Bank Name

I have made the payment from the joint account.  
For payment from bank joint account, please substantiate/support with bank statement to show proof that the Unit Holder is one of the account holders.

Cheque / Bank Draft No. \*

Please Input Cheque / Bank Draft No.

Amount (RM) \*

Please Input Amount

Please input Amount

CAMPAIGN CODE

PROCEED TO SUBMIT

### Note:

For submissions with two cheques (ie. two different accounts, please key in the details of both cheques under the Cheque / Bank Draft No. Column

- i. subject to a maximum of 45 characters
- ii. if exceeds, please submit another iPOS submission.

# iPOS for PRS

## Step 2.1:

Upload image of the Cheque. If payment is from a joint account, please upload image of joint account statement showing the name of the customer.

DR JOHN VINCENT

SAVE & EXIT

Fund Selection E-Application Review & Sign **Payment & Submit** Done

Bank Name\* PUBLIC BANK BERHAD

Cheque\* 1123-1134-1144

Amount (RM)\* 105,000.00

I have made the payment from the joint account.  
For payment from bank joint account, please substantiate/support with bank statement to show proof that the Unit Holder is one of the account holders.

Proof of Payment\*

Cheque

CAMPAIGN CODE

PROCEED TO SUBMIT

DR JOHN VINCENT

SAVE & EXIT

Fund Selection E-Application Review & Sign **Payment & Submit** Done

I have made the payment from the joint account.  
For payment from bank joint account, please substantiate/support with bank statement to show proof that the Unit Holder is one of the account holders.

Proof of Payment\*

Cheque

Proof of Joint Account\*

Proof

PROCEED TO SUBMIT

# iPOS for PRS

## Completion of Direct Pay.

The screenshot displays the iPOS interface for user DR JOHN VINCENT. At the top, a progress bar shows five steps: Fund Selection, E-Application, Review & Sign, Payment & Submit, and Done. The 'Done' step is highlighted with a blue circle and a checkmark. Below the progress bar, a card displays the user's name and ID: John Vincent - EA000007987Q1773112294216, with a REFRESH button. The card also shows the Transaction Type as 'New Enrolment' and the One-Time Contribution as 'AIA PAM - GLOBAL ISLAMIC GROWTH FUND' and 'AIA PAM - DYNAMIC ASIA EX-JAPAN FUND'. The Status is 'Submitted - Direct Pay' with a green checkmark. A Note at the bottom states: 'Note: Kindly note that submissions received after 4.00pm will be processed on the next working day.' At the bottom of the screen, there are two buttons: 'BACK TO PROFILE' and 'VIEW SUBMISSIONS'.

### Note:

1. Please ensure the cheque is correctly made payable to **APAM Sdn Bhd**.
2. Upon successful submission via iPOS, the cheque is to be submitted to AIA Customer Service Centers.
3. Cheque is to be enclosed inside an envelope with the following details provided:
  - Customer name
  - Agent name
  - Agent contact number



# iPOS for PRS – Support and Enquiry

For any support and enquiry, please contact your respective Agency Cross Sell (ACS) support Team:

Region	Sub-Region	ACS	Email	Contact Number
KL	CapSquare (KL1, KL2 & KL3)	Steven Tan	<a href="mailto:ChungTeck.Tan@aia.com">ChungTeck.Tan@aia.com</a>	012 3296080
	CapSquare (KL4, KL5 & KL6) & Shamelin	Teoh Kok Seong	<a href="mailto:KokSeong.Teoh@aia.com">KokSeong.Teoh@aia.com</a>	010 2328976
Klang	Klang	Christina Flora Joseph	<a href="mailto:christinafloraapjoseph@aia.com">christinafloraapjoseph@aia.com</a>	017 4172806
PJ, East Coast	PJ, East Coast	Michelle Leong	<a href="mailto:GaiLee.Leong@aia.com">GaiLee.Leong@aia.com</a>	017 6475570
East Malaysia	East Malaysia	Jerome Leong	<a href="mailto:Jerome-LH.Leong@aia.com">Jerome-LH.Leong@aia.com</a>	016 8513136
Penang	Penang 2, Seberang Jaya	Lau Beng Hock	<a href="mailto:BengHock.Lau@aia.com">BengHock.Lau@aia.com</a>	016 4426301
Penang, Kedah	Penang 1, Kedah	Jennifer Ang	<a href="mailto:Jennifer-BI.Ang@aia.com">Jennifer-BI.Ang@aia.com</a>	017 6714228
Perak	Perak	Jimmy Soo	<a href="mailto:Jimmy-CW.Soo@aia.com">Jimmy-CW.Soo@aia.com</a>	016 5353342
Lower South	Batu Pahat, Kluang & Johor Bahru	Sharon Wong	<a href="mailto:Sharon-SK.Wong@aia.com">Sharon-SK.Wong@aia.com</a>	016 7800618
Middle South	Seremban, Melaka, Muar & Segamat	Ravichandran	<a href="mailto:Ravichandran.Arul@aia.com">Ravichandran.Arul@aia.com</a>	016 2010929



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# Thank you