## Step to Step for Self Service Fund Switching

1. Go to Customer Portal link <u>https://www.tokiomarinelife.com.my/eServices/</u>



2. Key in NRIC number and password at below screen to Login Customer Portal.



3. Click 'View More' at the policy that you wish to do fund switching.



4. Click on Policy Details to view Fund Details. Then click on 'Fund Switching' button to proceed the application.

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INSURANCE GROUP	My Policy Self	Service e-Payment ~	My Document ~ e-C	laims ~ Forms Highlights	
		all a		H	les i
	The information is extracted as a	t 20/11/2019 12:00AM			
	Personal Details	Policy Details	Coverage Details	Intermediary Details	
Ster Ster	Policy Commencement Date	30/11/2004	Fund Details		
	Policy Issue Date	30/11/2004	Fund Name :	TokioMarine-Bond Fund	
	Policy Status	In Force	Fund Date : Total Unit Available :	08/05/2021 4.498.04	
	Maturity Date	30/11/2062	Unit Price :	RM 1.23456	
	Payment	Yearly	Fund Value : Percentage :	RM 5,553.10 100.00 %	
	Installment Premium	RM 0.00	Total Fund Value :	RM 5,553.10	
	Payment Method	Credit Card Autodebit	Partial Withdrawal		
	Autodebit Details	HSBC VISA CARD	Fund Switching Premium Redirection		
	Direct Credit Details	N/A EDIT			

- 5. Message will be displayed for the below scenarios when customer click on fund switching button.
  - A) Product that not allowed for Fund Switching



B) No unit balance available for Fund Switching



C) Trust Policy

nformation	×
s this is a Trust policy, the Trustee's consent is required for this application.	
Please download and fill the REQUEST FOR ALTERATION FORM complete with the Trustomercare@tokiomarinelife.com.my	ustee's signature and email to us at

6. It will display the Current Fund Details, click 'Next' to proceed.

	Policy Details Policy No Name of Policy Owner Name of Life Assured		
	Basic Plan Name	AsiaPartner i-Flex Plus	
	Commencement Date	30/11/2004	
1292	Maturity Date	30/11/2062	
	Current Fund Details		
	Fund Name	Value 08/05/2021	Units
	TokioMarine-Bond Fund	RM5,553.10	4,498.04
	Total	RM5,553.10	4,498.04
	copyrjught © 2018 Tokio Marine L	In one makey Malayan Bird Alt Martes Reserved	Net

7. Key in percentage to be switched at below screen, click 'Next' to proceed.

		ATTENTION: Application Switch From	received after 3pm is deemed as re Fund Value as at 08/05/2021 (RM)	reived the next business day. Percentage to be switched (%)	Estimated Fund Value (RM) to be switched
A A		TokioMarine-Bond Fund	RM5,553.10	50	RM 2,776.55
AAAA		Important Notes:	switched has to be specified in terr	ns of percentage (%).	
- A - A		1. The rund value to be	s anticence mus to be apecifice in ten		
	HH-	2. The fund switching i 3. The fund switching i 4. For policy with both	s subject to "minimum amount for fu s subject to "minimum fund value av Protection and Investment Fund, the	nd switching" based on the availa ailable after switching" based on t switching needs to be performed	ble fund value (if applicable). he available fund value (if applicable). for both fund together.

Note: Below message will be prompted if:

A) Customer did not key in any percentage



B) Customer keyed in the percentage is greater than 100%



The respective message will be displayed on the minimum fund switch amount and minimum fund balance after switching:

A) Fund value is less than RM 1,000 for each fund



B) Fund switch amount is less than RM 500.00 for each fund



C) Fund balance after fund switching is less than RM 500.00 for each fund



8. Select the type of funds and percentage that you would like to switch to, click 'Next' to proceed.

Please click the below:

- i. 'Add Row' if customer would like to switch to more than 2 funds.
- ii. 'Remove' if customer would like to remove one of the selected fund



Note: Below message will be prompted:

A) Total percentage is not equals to 100%



B) If customer select the same type of funds as per existing fund type(s) Example: From Tokio Marine Luxury Fund to Tokio Marine Luxury Fund



C) If customer select the same type of funds (duplicate fund type) Example: Select same fund type twice at "Switch To" screen

Alert ×
Please select a different type of funds.

9. Click on "Important Notice" to read and acknowledge "Fund Value Sufficiency Notification".



It is mandatory for customer to click and view the Important Notice. If customer did not click and view, the message below will be displayed.



10. Fund Value Sufficiency Notification will be prompt out.



- 11. If customer agrees to proceed, then check on the box "I have read and understood the contents of Fund Value Sufficiency Notification and would like to proceed with Fund Switching request."
  - I/ We, the Policy Owner/ Assignee in the abo accordance with the above particulars.
     Fund Value Sufficiency Notification ned policy, hereby authorize and request that the above policy be changed in I have read and understood the contents of "Fund Value Sufficiency Notification" and would like to proceed with Fund Switching request 1 do
- A) Then, click on 'Next' button.

Note: If customer did not check the box, the message below will be prompted:



B) If customer decided not to proceed with fund switching due to impact on the policy's sustainability. Please click on 'I do not want to proceed' button.



12. Click on "Terms and Conditions" to read and acknowledge.



It is mandatory for customer to click and view the Terms and Conditions. If customer did not click and view, the message below will be displayed.



13. Terms and Conditions for fund switching will prompt up. Then, click on 'Close' button to proceed.

 FUND SWITCHING

 Note:

 1. The fund switching is applicable to ALL Investment-Linked plans and subject to terms and conditions of respective plan as stated in the policy contract.

 2. Switching fee may be applicable depending on the product. Please refer to your policy contract for more details.

 3. Minimum switching amount allowed for Fund Switching may be applicable.

 DATA PRIVACY

 I/We understand and agree that the information I/we supply will be collected, used and processed by the Company, its agents and its authorised parties (within or outside of Malaysia) for the purposes of processing this application and to facilitate the Company's function as an insurance company. I/We understand that I/We have a right to obtain access to and to request correction of my/our personal information held by the Company by contacting the Company's Customer Service Representatives.

14. Check on the box "I, the Policy Owner of Policy, hereby declare that I have read and understood the Terms and Conditions." to proceed. Then, click on 'Next' button.



Note: Below message will be prompted if customer did not check on the box.



15. TAC will be sent to registered mobile phone number via SMS. Key in TAC number at below screen within 60 seconds then click on 'Confirm' button.



Note: Below message will be prompted:

A) If customer key in invalid TAC



B) If customer request new TAC number



16. Once application successfully submitted, the message below will be displayed. Click on "Finish" and exit from the screen.



17. Below message will be prompted if customer already submitted the fund switching or partial withdrawal on the same day.

