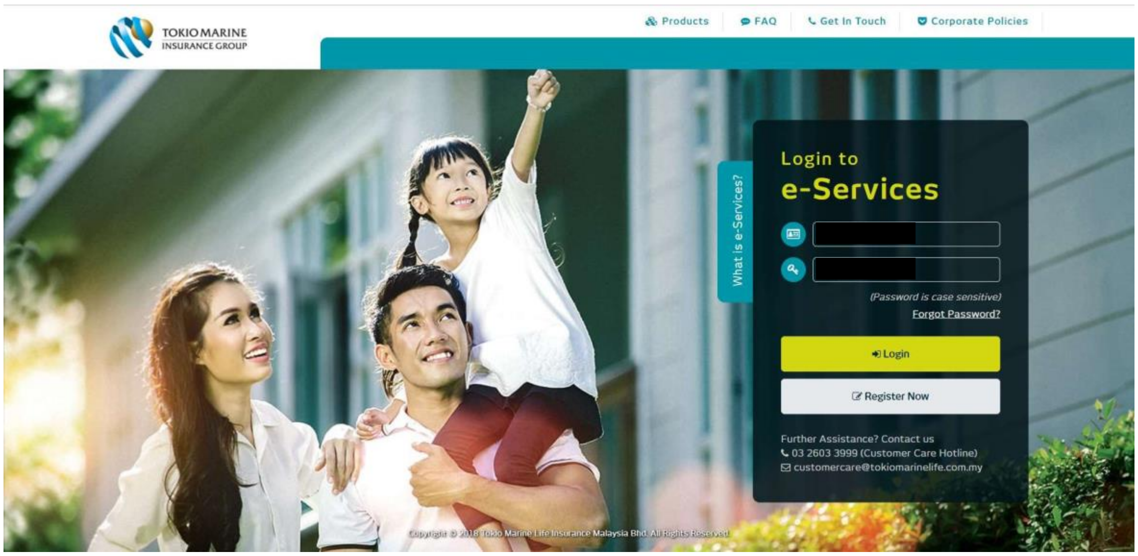
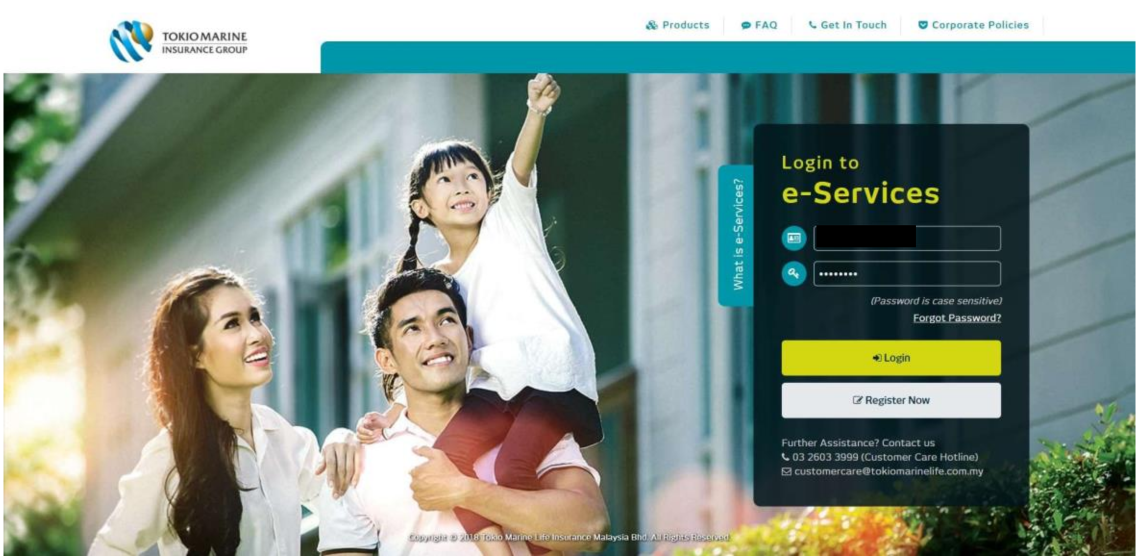
Step to Step for Self Service Fund Switching

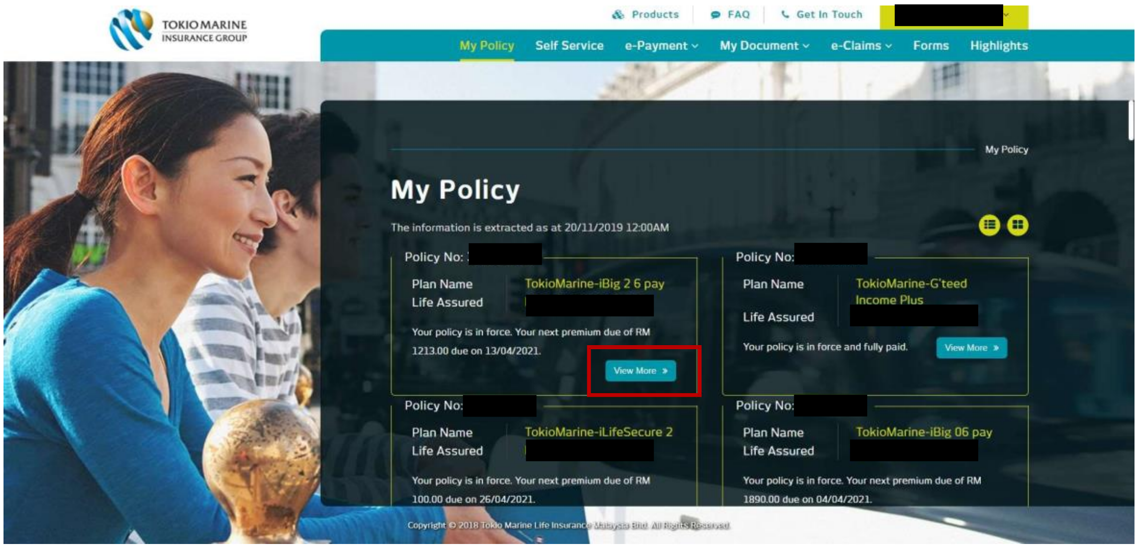
1. Go to Customer Portal link https://www.tokiomarinelife.com.my/eServices/



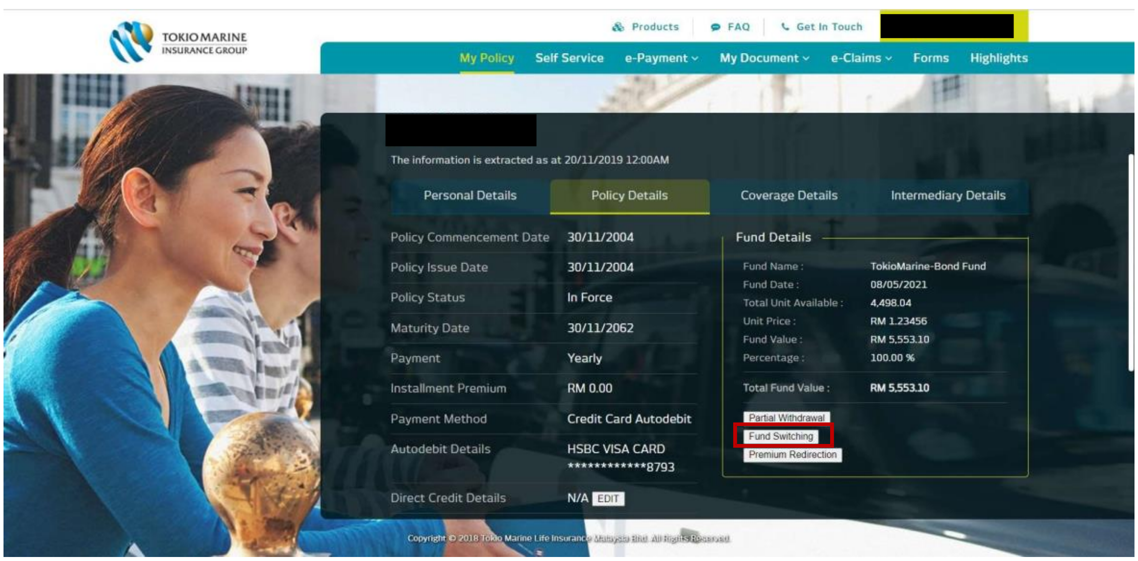
2. Key in NRIC number and password at below screen to Login Customer Portal.



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

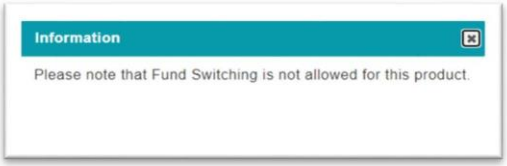


4. Click on Policy Details to view Fund Details. Then click on ‘Fund Switching’ button to proceed the application.

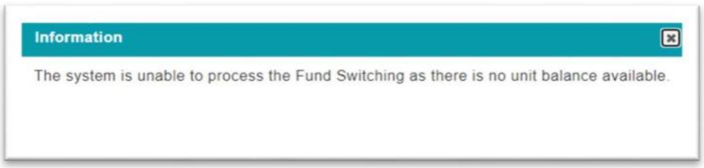


5. Message will be displayed for the below scenarios when customer click on fund switching button.

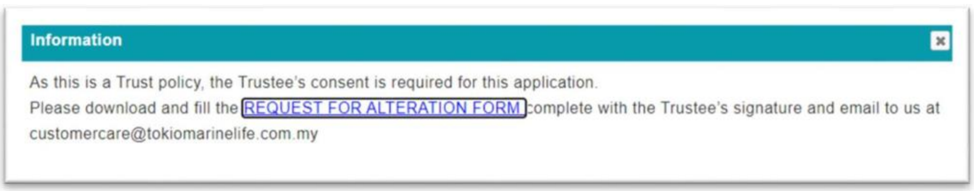
   A) Product that not allowed for Fund Switching



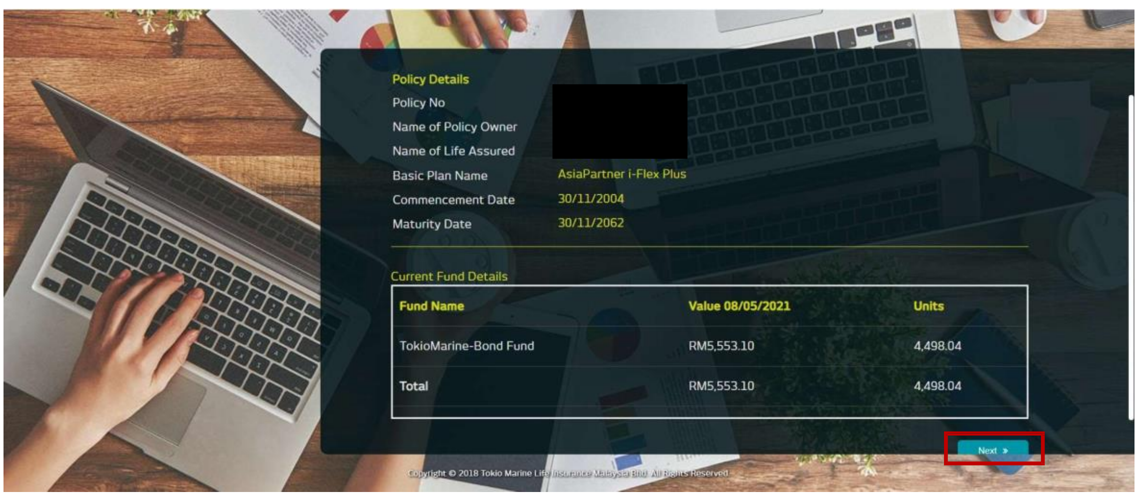
   B) No unit balance available for Fund Switching



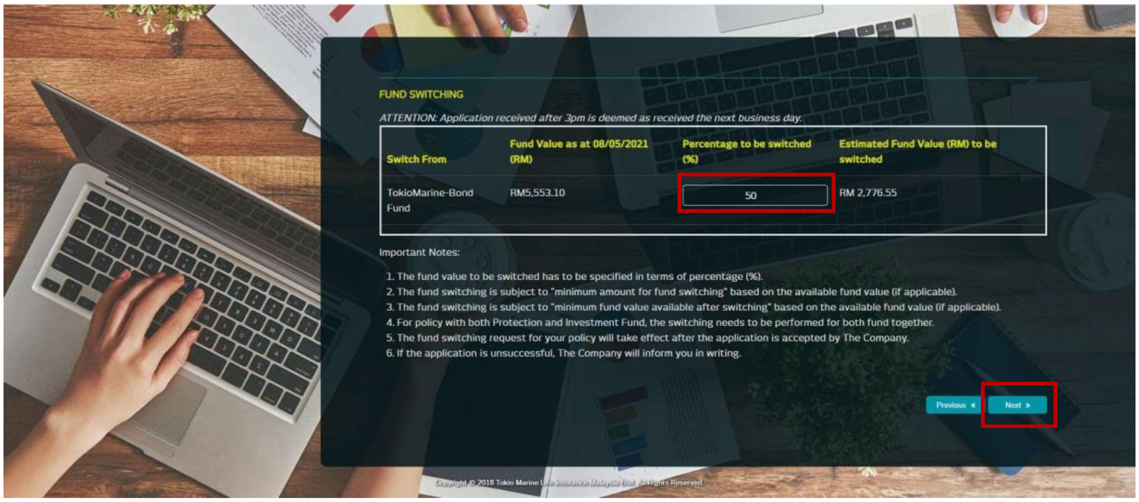
   C) Trust Policy



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

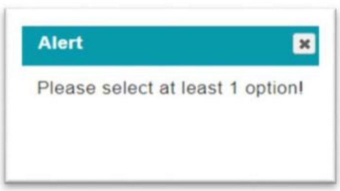


7. Key in percentage to be switched at below screen, click ‘Next’ to proceed.

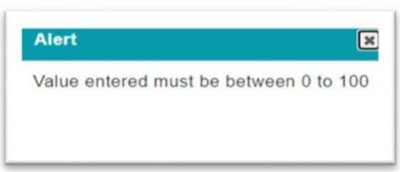


Note: Below message will be prompted if:

A) Customer did not key in any percentage

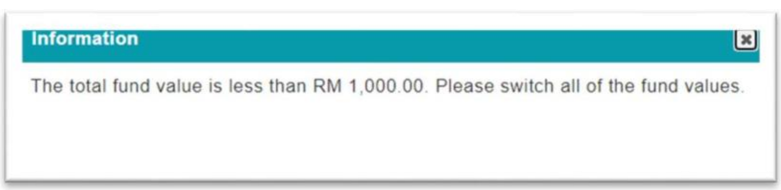


B) Customer keyed in the percentage is greater than 100%

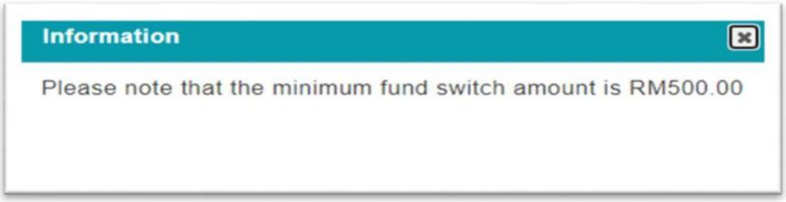


The respective message will be displayed on the minimum fund switch amount and minimum fund balance after switching:

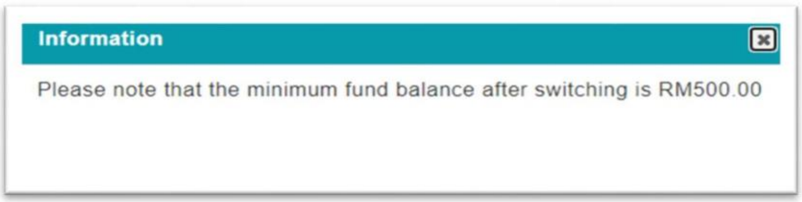
A) Fund value is less than RM 1,000 for each fund



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



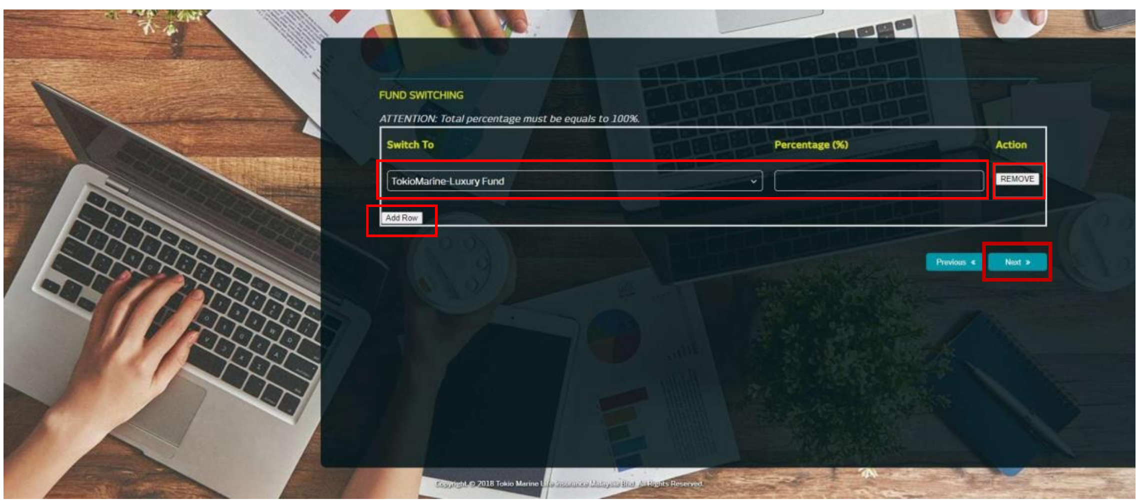
C) Fund balance after fund switching is less than RM 500.00 for each fund



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

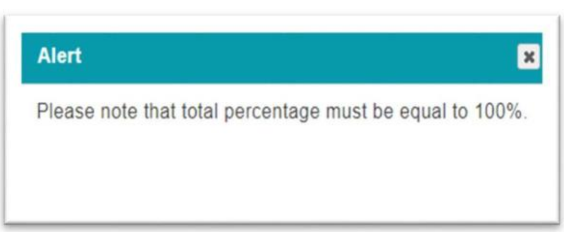
Please click the below:

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



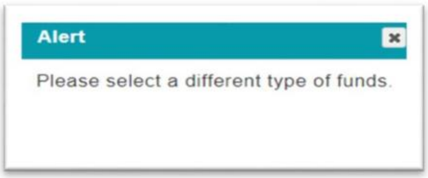
Note: Below message will be prompted:

A) Total percentage is not equals to 100%

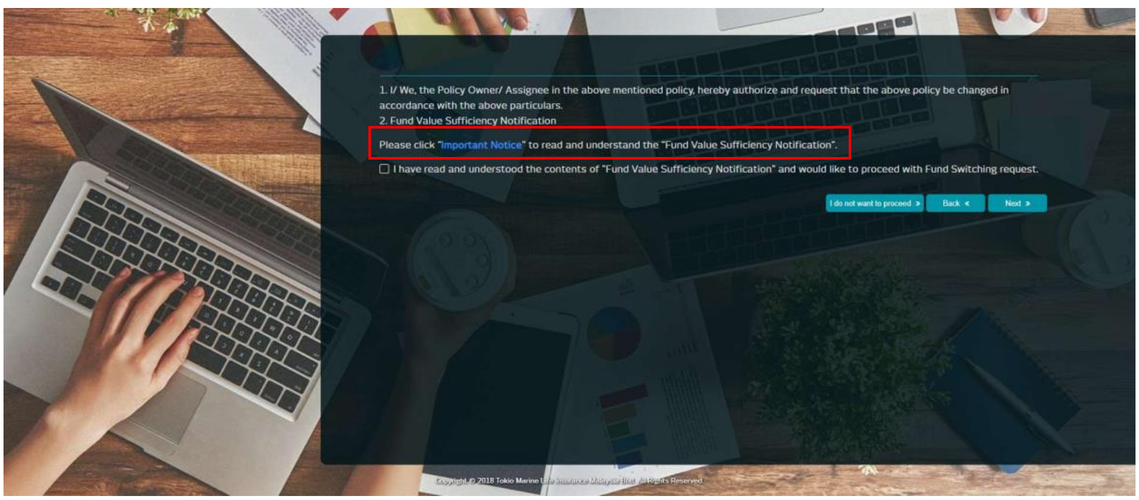


B) If customer select the same type of funds as per existing fund type(s)
Example: From Tokio Marine Luxury Fund to Tokio Marine Luxury Fund

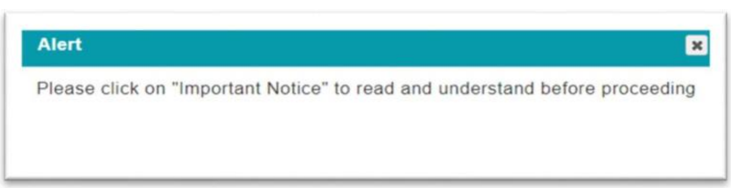
C) If customer select the same type of funds (duplicate fund type)
Example: Select same fund type twice at "Switch To" screen



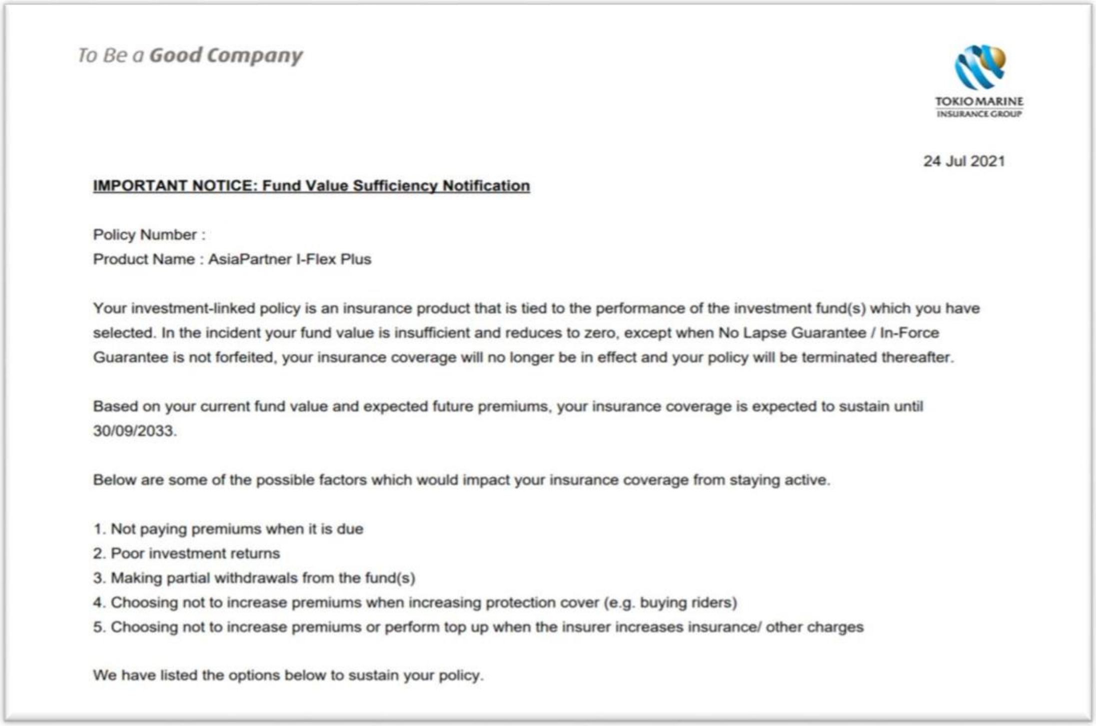
9. Click on "Important Notice" to read and acknowledge "Fund Value Sufficiency Notification".



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.



To Be a Good Company

TOKIO MARINE INSURANCE GROUP

24 Jul 2021

IMPORTANT NOTICE: Fund Value Sufficiency Notification

Policy Number :
Product Name : AsiaPartner I-Flex Plus

Your investment-linked policy is an insurance product that is tied to the performance of the investment fund(s) which you have selected. In the incident your fund value is insufficient and reduces to zero, except when No Lapse Guarantee / In-Force Guarantee is not forfeited, your insurance coverage will no longer be in effect and your policy will be terminated thereafter.

Based on your current fund value and expected future premiums, your insurance coverage is expected to sustain until 30/09/2033.

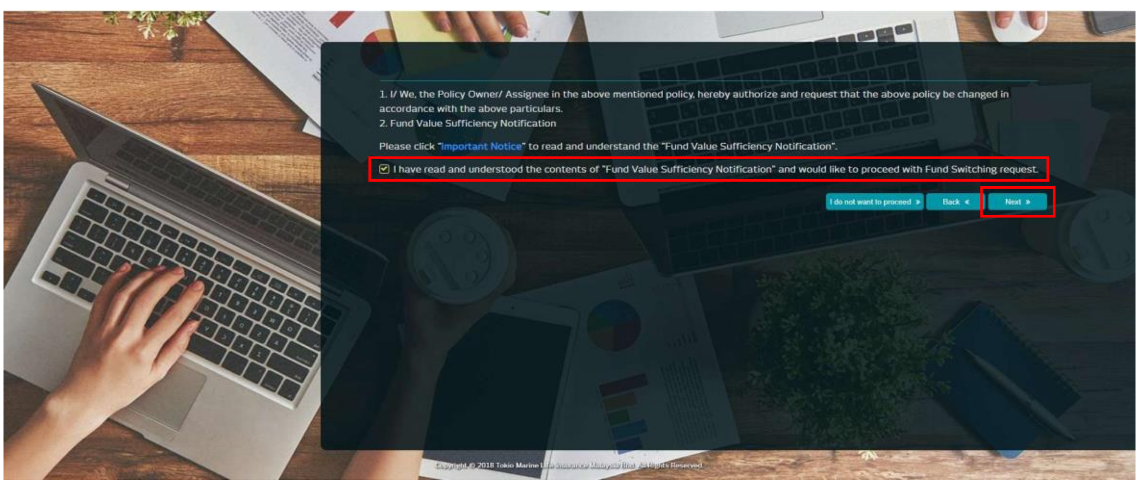
Below are some of the possible factors which would impact your insurance coverage from staying active.

1. Not paying premiums when it is due
2. Poor investment returns
3. Making partial withdrawals from the fund(s)
4. Choosing not to increase premiums when increasing protection cover (e.g. buying riders)
5. Choosing not to increase premiums or perform top up when the insurer increases insurance/ other charges

We have listed the options below to sustain your policy.

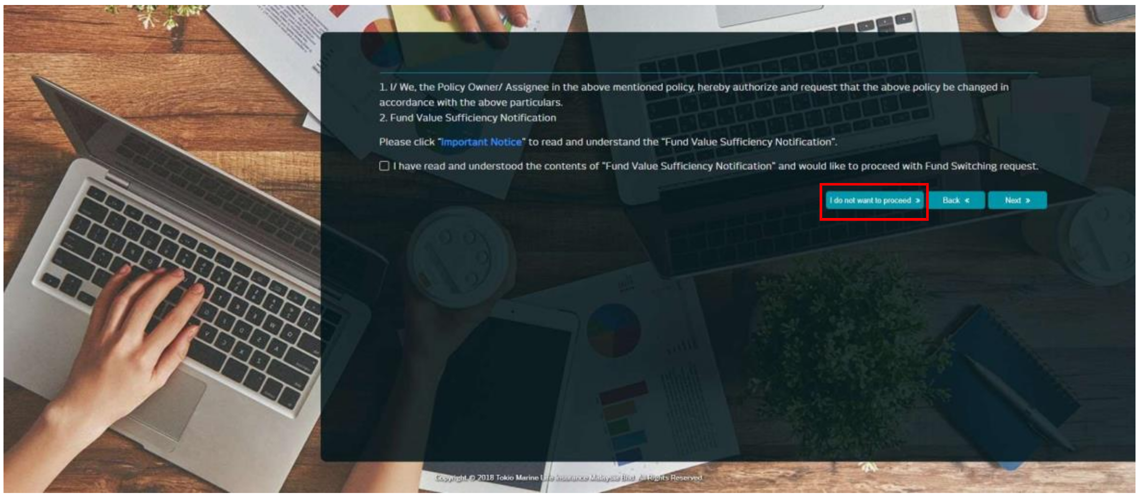
11. If customer agrees to proceed, then check on the box "I have read and understood the contents of Fund Value Sufficiency Notification and would like to proceed with Fund Switching request."

A) Then, click on 'Next' button.

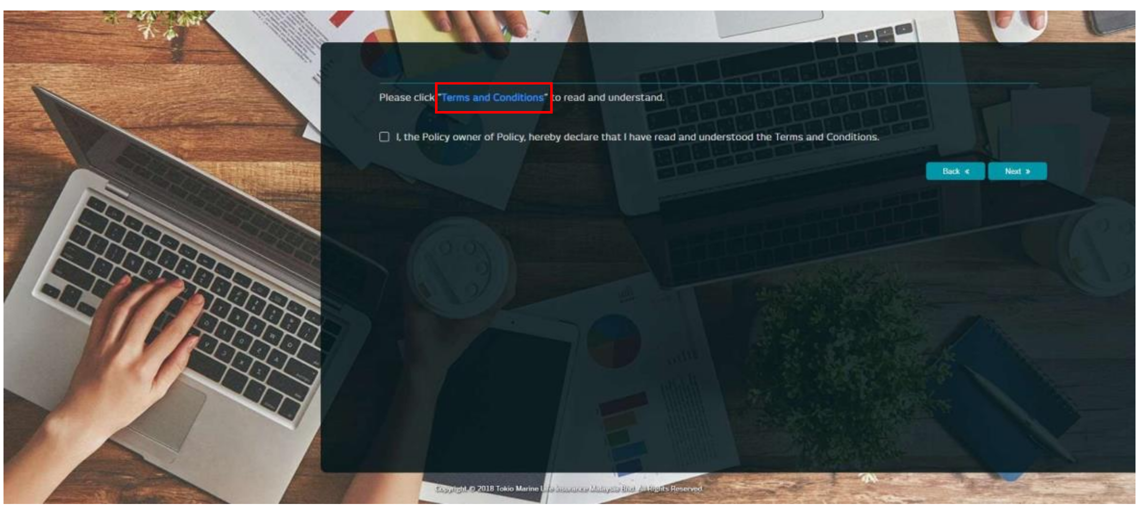


Note: If customer did not check the box, the message below will be prompted:

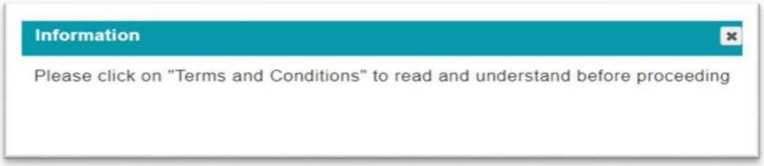
B) If customer decided not to proceed with fund switching due to impact on the policy's sustainability. Please click on 'I do not want to proceed' button.



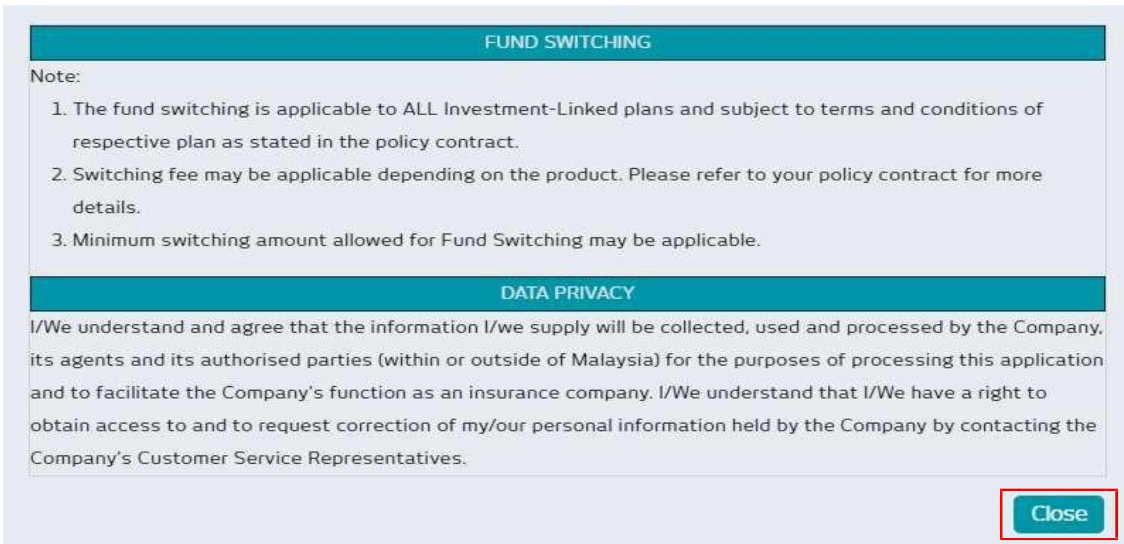
12. Click on "Terms and Conditions" to read and acknowledge.



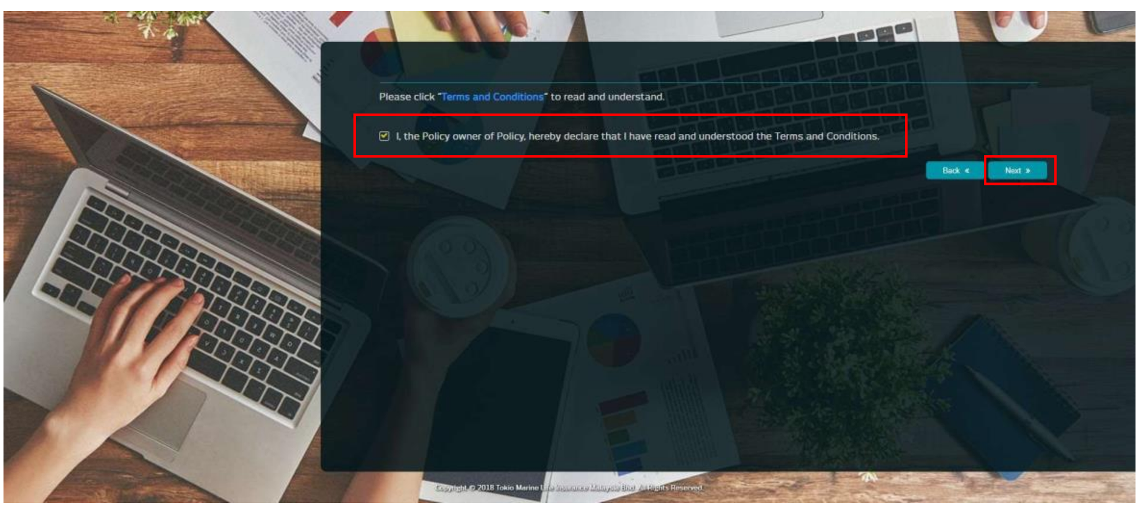
It is mandatory for customer to click and view the Terms and Conditions. If customer did not click and view, the message below will be displayed.



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

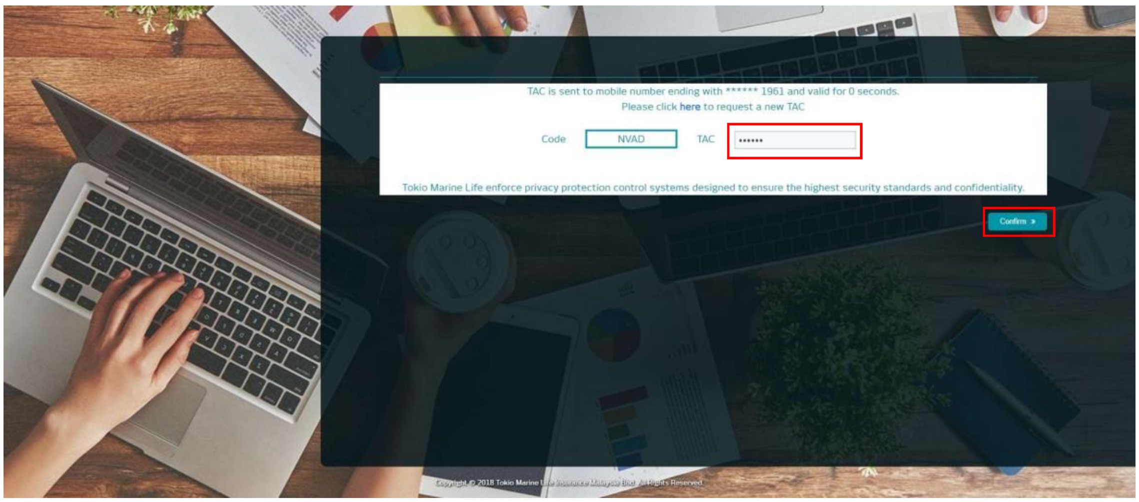


14. Check on the box “I, the Policy Owner of Policy, hereby declare that I have read and understood the Terms and Conditions.” to proceed. Then, click on ‘Next’ button.



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

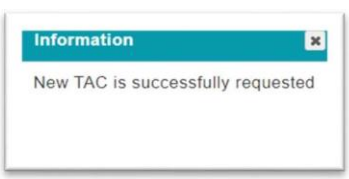
15. TAC will be sent to registered mobile phone number via WhatsApp. Key in TAC number at below screen within 60 seconds then click on ‘Confirm’ button.



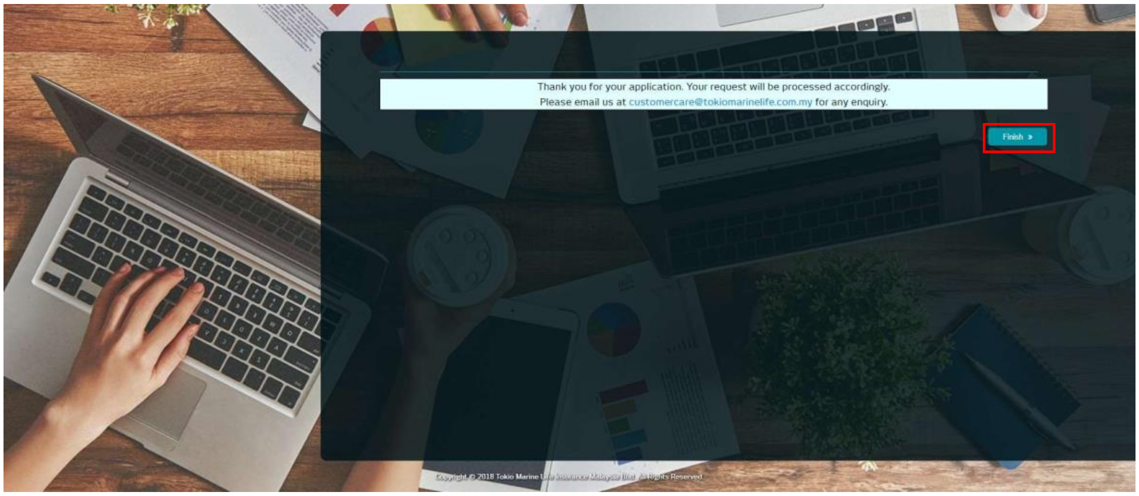
Note: Below message will be prompted:

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.