

## SERVICE GUIDE

Our Bank offers Sun Life Malaysia's life insurance / family Takaful products through our branches. If you intend to purchase / participate in a life insurance / family Takaful product marketed by our Bank Representative / Financial Executive, you can enjoy these value-added services.

### What services can you expect from our Bank Representative / Financial Executive?

#### 1 BEFORE YOU BUY AN INSURANCE / PARTICIPATE IN A TAKAFUL PLAN

##### Assist you in choosing the right plan

- Go through with you the Customer Fact Find Form to understand your financial needs, financial goals and risk appetite.
- Recommend the suitable plan(s) after assessing your needs.

##### Explain product features

- Explain the product features, benefits payable, exclusions, premiums / contributions and charges.
- Provide Product Disclosure Sheet (PDS) to assist you in making informed decision and to facilitate product comparison.

#### 2 WHEN YOU DECIDE TO BUY AN INSURANCE / PARTICIPATE IN A TAKAFUL PLAN

##### Assist you with completing the application

- Explain the importance of answering the questions in the proposal / application form fully and accurately.
- Explain the importance of making a nomination and / or *hibah* to ensure benefits payable are received by your nominees or beneficiaries in the event of death.
- Submit your application for underwriting after you have signed the proposal / application form.

##### Explain the product information stated in the Product Disclosure Sheet (PDS)

- Go through the PDS information with you to ensure that this is the right plan that you have purchased / participated.
- Your policy / contract documents will be delivered to you (via post or electronically) within 7 working days from the policy / contract issuance date.

#### 3 DURING THE TERM OF AN INSURANCE / TAKAFUL PLAN

##### Continuous policy / contract servicing

- Assist in submitting your service requests to Sun Life Malaysia, e.g. policy / contract modification, change of address and frequency of premium / contribution payment.

##### Assist you in making a claim

- Guide you through the standard procedures on how to file a claim. which are also available on Sun Life Malaysia's website at <https://www.sunlifemalaysia.com/customer-care/make-a-claim>.

##### SunAccess Client Portal

Please visit Sun Life Malaysia's client portal at <http://sunaccess.sunlifemalaysia.com/portal-ui/CUSTOMER/login> for online access to your policy / contract information.

If you are not satisfied with the services of the Bank Representative / Financial Executive or require additional support, you may contact us at +603 6204 7788 or Sun Life Malaysia's Client Careline at 1300-88-5055.



Underwritten / Managed by:



## BANKASURANS / BANKATAKAFUL

Bank kami menawarkan produk-produk insurans hayat / Takaful keluarga Sun Life Malaysia melalui cawangan kami. Jika anda bercadang untuk membeli / menyertai produk insurans hayat / Takaful keluarga melalui Wakil / Eksekutif Kewangan Bank, anda boleh menikmati perkhidmatan tambahan seperti yang dinyatakan.

### Apakah perkhidmatan yang anda harapkan daripada Wakil / Eksekutif Kewangan Bank?

1

#### SEBELUM ANDA MEMBELI PELAN INSURANS / MENYERTAI PELAN TAKAFUL

##### Membantu anda memilih pelan yang sesuai

- Menerangkan kandungan Borang Pencarian Fakta Pelanggan supaya anda memahami keperluan kewangan dan risiko anda dan juga matlamat kewangan anda.
- Mencadangkan pelan yang sesuai selepas menilai keperluan anda.

##### Menerangkan ciri-ciri produk

- Menerangkan ciri-ciri produk, manfaat yang dibayar, pengecualian, premium / sumbangan dan caj-caj.
- Menyediakan Dokumen Keterangan Produk untuk membantu anda dalam membuat keputusan yang tepat dan untuk memudahkan anda membuat perbandingan produk.

2

#### APABILA ANDA MEMBUAT KEPUTUSAN UNTUK MEMBELI PELAN INSURANS / MENYERTAI PELAN TAKAFUL

##### Membantu anda dalam melengkapkan permohonan

- Menerangkan kepentingan menjawab soalan-soalan di dalam borang permohonan dengan lengkap dan tepat.
- Memaklumkan kepentingan membuat penamaan dan / atau hibah untuk memastikan manfaat yang perlu dibayar diterima oleh penama atau benefisiari anda sekiranya berlaku kematian.
- Menghantar permohonan anda untuk pengunderaitan selepas anda menandatangani borang permohonan.

##### Menerangkan informasi produk yang dinyatakan dalam Dokumen Keterangan Produk

- Menerangkan informasi yang dinyatakan dalam Dokumen Keterangan Produk untuk memastikan bahawa pelan yang anda beli / sertai memenuhi keperluan anda.
- Dokumen polisi / kontrak anda akan dihantar kepada anda (melalui pos atau elektronik) dalam masa 7 hari bekerja daripada tarikh pengeluaran polisi / kontrak.

3

#### SEMASA TEMPOH PELAN INSURANS / TAKAFUL

##### Perkhidmatan polisi / kontrak yang berterusan

- Membantu dalam mengemukakan permintaan perkhidmatan anda kepada Sun Life Malaysia seperti pengubahsuaian polisi / kontrak, pertukaran alamat dan kekerapan pembayaran premium / sumbangan.

##### Membantu anda dalam membuat tuntutan

- Membantu anda dalam membuat tuntutan melalui prosedur standard, yang juga boleh didapati di laman web Sun Life Malaysia di <https://www.sunlifemalaysia.com/customer-care/make-a-claim>.

#### Portal Pelanggan SunAccess

Sila layari portal pelanggan Sun Life Malaysia di <http://sunaccess.sunlifemalaysia.com/portal-ui/CUSTOMER/login> untuk mengakses maklumat polisi / kontrak anda secara online.

Sekiranya anda tidak berpuas hati dengan perkhidmatan Wakil / Eksekutif Kewangan Bank atau memerlukan bantuan tambahan daripada kami, anda boleh menghubungi kami di **+603 6204 7788** atau talian Khidmat Pelanggan Careline Sun Life Malaysia di **1300-88-5055**.

Diunderait / Diuruskan oleh:

