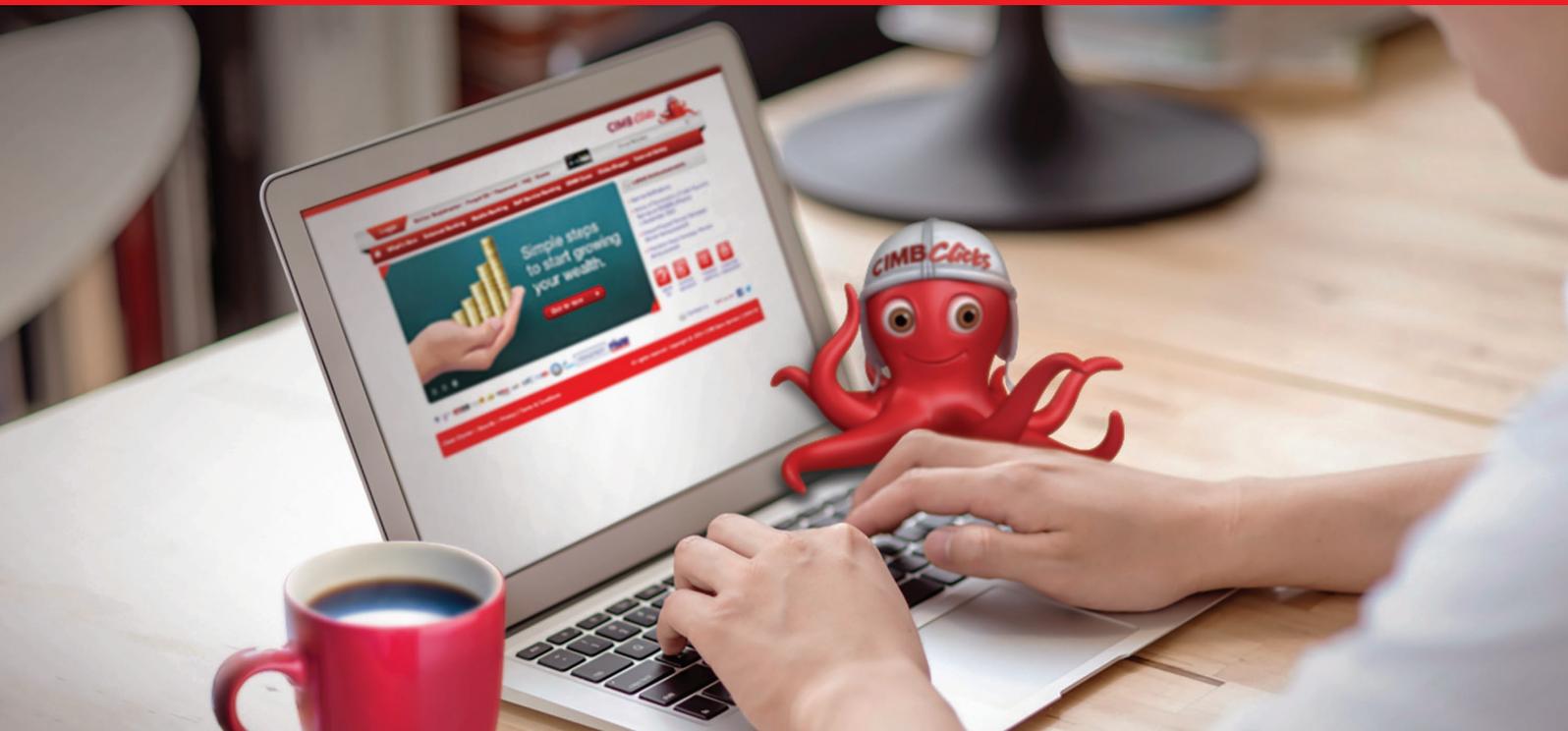


# HOW TO TOP UP PRS FUNDS VIA CIMB CLICKS?

## Step-by-Step Guide



### STEP 1



Log In to Your  
CIMB Clicks Account

### STEP 2



Get to Your  
PRS Account

### STEP 3



View Your PRS  
Account Details

### STEP 4



How to Purchase PRS

(Contribution Direction\* : Do-It-For-Me or Do-It-Myself)

4 (a) : How to Purchase PRS (Do-It-For-Me)

4 (b) : How to Purchase PRS (Do-It-Myself)

\*Contribution Direction is by default.

### STEP 5



Your Status of  
Purchase

CIMB Bank Berhad (13491-P)



## STEP 1: Log In to Your CIMB Clicks Account

Online Registration | Forgot ID / Password | FAQ | Demo You are in a secured site

Welcome to CIMB Clicks Internet Banking Malaysia

User ID :

For other online banking enquiries, call our Customer Care hotline at 1 300 880 900 or 603-2295 6100 if you're overseas (24 hours daily, including holidays).

**(i) Insert your User ID**

**(ii) Click Submit**

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Online Registration | Forgot ID / Password | FAQ | Demo You are in a secured site

Welcome to CIMB Clicks Internet Banking Malaysia

**new**

If this is NOT your chosen SecureWord, DO NOT login. Please call our customer care hotline.

Password :

For other online banking enquiries, call our Customer Care hotline at 1 300 880 900 or 603-2295 6100 if you're overseas (24 hours daily, including holidays).

**(iii) Insert your Password**

**(iv) Click Submit**

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## PRS ACCOUNT

### STEP 2: Get to Your PRS Account

2 (i) Select My Investments

The screenshot shows the CIMB Clicks website interface. The 'My Investments' menu is open, and the 'Private Retirement Scheme' option is highlighted. A red callout box points to this option with the text '2 (ii) Select Private Retirement Scheme'. The website header includes 'CIMB Clicks', 'Logout', and various navigation tabs like 'My Accounts', 'My Investments', 'Transfer', 'Claim', 'Pay', 'Top Up', 'Apply For', 'More Stuff', and 'Settings'. The main content area displays a grid of service icons, including 'Special Offers', 'My Mailbox', 'Kwik Claims', 'View All Accounts', and 'Transfer Within CIMB Bank'. A 'Kwik Account' banner is also visible on the right side.

2 (ii) Select Private Retirement Scheme

### STEP 3: View Your PRS Account Details

3 (i) Click on the drop down list & select View Details

The screenshot shows the 'Private Retirement Scheme Account' details page on the CIMB Clicks website. A dropdown menu is open under the 'View Details' link, showing options: 'View Details', 'Purchase', 'Fund Pricing', and 'Status Enquiry'. A red callout box points to the 'View Details' option with the text '3 (i) Click on the drop down list & select View Details'. The page displays account information in a table format, including PPA No, PRS Account No, and Contribution Direction. A table below shows the fund details for 'CIMB-Principal PRS Plus Growth Class A'.

PPA No	PRS Account No	Contribution Direction
PPA820202113698	33394	Do-It-For-Me
Total Amount Contributed: RM 1,200.00		Total Amount Withdrawn: RM 0.00

Fund Name	Sub Account A (units)	Sub Account B (units)	Total Units Balance	NAV Price (RM)	Current Market Value (RM)
<a href="#">CIMB-Principal PRS Plus Growth Class A</a>	1503.91	643.49	2,147.40	0.5700	1224.02
Total					1,224.02

★ "Contribution Direction" is by default and has been set during your latest PRS purchase.

DO-IT-FOR-ME



DO-IT-MYSELF

## STEP 4: How to Purchase PRS

**CIMB Clicks**

You are in a secured site

My Accounts ▾ My Investments ▾ Transfer ▾ Claim ▾ Pay ▾ Top Up ▾ Apply For ▾ More Stuff ▾

My Investments ▾ Private Retirement Scheme ▾ **View Details** ▾ Select a service

View Details  
Purchase  
Fund Pricing  
Status Enquiry

**Private Retirement Scheme Account**

PPA No	PRS Account No	Contribution Direction
PPA820202113698	33394	Do-It-For-Me
Total Amount Contributed: RM 1,200.00		Total Amount Withdrawn: RM 0.00

Fund Name	Sub Account A (units)	Sub Account B (units)	Total Units Balance	NAV Price (RM)	Current Market Value (RM)
<a href="#">CIMB-Principal PRS Plus Growth Class A</a>	1503.91	643.49	2,147.40	0.5700	1224.02
<b>Total</b>					1,224.02

Quick Show

- Special Offers
- My Mailbox (1)
- Kwik Claims
- View All Account
- View All Accounts
- Transfer Within CIMB Bank
- Transfer to Other Banks
- Pay Bills

4 (a) (i) or (b) (i)

Click on the drop down list to select **Purchase** & you will be redirected to a new page

## STEP 4: How to Purchase PRS - Risk Profiling Done

4 (a) (ii) or (b) (ii) You have already done your risk profiling test, and you are **Conservative**. Click **Next** to proceed.

My Investments ▾ Private Retirement Scheme ▾ **Purchase** ▾ Select a service

**Private Retirement Scheme Purchase**

**Risk Tolerance Level : Conservative**

Above is your current Risk Tolerance Level. Please click on 'Next' to proceed with Private Retirement Purchase or click on 'Proceed to Risk Profiler' for re-rating of Risk Tolerance Level.

**Proceed to Risk Profiler** **Next**

DO-IT-FOR-ME



DO-IT-MYSELF

## STEP 4: How to Purchase PRS - Risk Profiling Yet To Be Completed

My Investments ▶ Financial Planning ▶ Risk Profiler

### Risk Profiling and Fund Suggestion Tool

Please fill in the following questions:

Name : LOW HUAY PENG

Email :

Tel : (0)

Income : - please select

Your request is submitted. Our personnel will be contacting you soon.

[Financial Planning](#) [Open Unit Trust Account](#) [Top Up my PRS Account](#)

4 (a) (ii) or (b) (ii)

You have not done your Risk Profiling questionnaire, please proceed to complete the following questions.

4 (a) (ii) or (b) (ii)

Well done! You have now completed your Risk Profiling questionnaire, please click **Top Up my PRS Account** to proceed.

## STEP 4 (a): How to Purchase PRS (Do-It-For-Me)

My Investments ▶ Private Retirement Scheme ▶ Purchase

Select a service

### Private Retirement Scheme Purchase

Your Current Risk : **Balanced** (For more information, [Click Here](#))  
Profile

PPA Number : PPA820202113698

PRS Account Number : 33394

Fund Manager : CIMB-Principal Asset Management

Pay From :

Contribution Amount : RM

Payment Schedule :  Now  
 Later  
 First of the Month  
 Single Once  
 Recurring Weekly

Contribution : Do it for me  
Direction

4 (a) (iii) **Select an account to pay from**

4 (a) (iv) Insert your **Contribution Amount** e.g. RM10,000

4 (a) (v) Select the **Payment Schedule** e.g. **Now**

*"Contribution Direction" is by default and has been set during your latest PRS purchase.*



## STEP 4 (a): How to Purchase PRS (Do-It-For-Me)

**General Declaration & Terms and Conditions:**

APPLICANT'S DECLARATION AND CIMB PRINCIPAL ASSET MANAGEMENT BERHAD'S TERMS AND CONDITIONS Statement and Declaration by Applicant

- I acknowledge that I have received, read and understood the CIMB-Principal Asset Management Berhad's (CIMB-Principal) First Replacement Disclosure Document dated 31 July 2014 for the Private Retirement Scheme (PRS) Fund(s) to be invested in, CIMB-Principal's supplementary Disclosure Document(s) (if any), and the terms and conditions stipulated in (i) CIMB-Principal's website (www.cimb-principal.com.my); (ii) the Private Pension Administrator's (PPA) website (www.ppa.my); and (iii) the terms and conditions stated below and I undertake to be bound by them for my initial and subsequent transactions with CIMB-Principal.
- I am aware of the fees and charges that I will incur directly or indirectly when investing/contributing in the Fund(s)/Scheme(s).
- I acknowledge and accept that CIMB-Principal has absolute discretion to rely on this confirmation from me and I undertake to indemnify and hold harmless CIMB-Principal, its employees and agents against all costs, expenses, loss and liabilities, claims and demands arising out of this confirmation.

I hereby confirm that I understand the following: (a) Private Retirement Scheme and units in such schemes are insured by FIDM; and (b) I understand the risks involved in purchasing units in a Private Retirement Scheme.

I hereby acknowledge and accept that CIMB-Principal reserves the right to accept or reject any application in whole or in part thereof in respect thereof, without compensation to the Applicant and the duly authorized agent of CIMB-Principal is deemed irrevocable by the Applicant.

Where the terms and conditions contained herein, CIMB-Principal shall be at liberty to disregard or vary the terms and conditions.

Accept  Decline

I hereby confirm that I understand the following: (a) Private Retirement Scheme and units in such schemes are insured by FIDM; and (b) I understand the risks involved in purchasing units in a Private Retirement Scheme.

I hereby acknowledge and accept that CIMB-Principal reserves the right to accept or reject any application in whole or in part thereof in respect thereof, without compensation to the Applicant and the duly authorized agent of CIMB-Principal is deemed irrevocable by the Applicant.

Where the terms and conditions contained herein, CIMB-Principal shall be at liberty to disregard or vary the terms and conditions.

To view the product highlights sheet, Disclosure Document (including Supplementary Disclosure Document(s) (if any) and the Pre-Investment Form issued by FIMM, Adobe Reader software is required. Please browse to <http://www.adobe.com> to download the software.

Customers may subscribe for PRS via CIMB Clicks. For redemption, switching, transfer or the exercise of any cooling-off right under PRS, customers may proceed to any CIMB Bank branches in Malaysia.

4 (a) (vii) Click **Accept**

4 (a) (vi)  
Read the **General Declaration & Terms and Conditions**

4 (a) (viii) Tick the boxes to acknowledge that you understand the Terms and Conditions

4 (a) (ix) Click **Submit**

**CIMB Clicks**

You are in a secured site Logout

My Accounts ▾ My Investments ▾ Transfer ▾ Claim ▾ Pay ▾ Top Up ▾ Apply For ▾ More Stuff ▾ Settings ▾

My Investments ▸ Private Retirement Scheme ▸ Purchase

**Private Retirement Scheme Purchase Confirmation**

Your Current Risk Profile : Balanced

PPA Number : PPA820202113698

PRS Account Number : 33394

Fund Manager : CIMB-Principal Asset Management

Pay From : 7054179604 | Savings Account

Contribution Amount : RM 10,000.00

Sales Charge : 3.00%

Payment Schedule : Now

Contribution Direction : Do it for me

Special Offers

- My Mailbox (1)
- Kwik Claims
- View All Account
- View All Accounts
- Transfer Within CIMB Bank
- Transfer to Other Banks
- Pay Bills
- Pay Credit Cards
- Prepaid Reload

4 (a) (x) Check your purchase details



## STEP 4 (a): Your PRS Purchase Confirmation (Do-It-For-Me)

Please note that other fees or charges may be levied by the PRS Provider or PPA in addition to the sales charge when making a contribution into the PRS fund(s). All fees and charges are subject to taxes (including but not limited to service tax or Government Service Tax (GST)) which shall be payable by the applicant.

A printed copy of the product highlights sheet, Disclosure Document (including Supplementary Disclosure Document(s) (if any) and the Pre-Investment Form issued by FIMM can be obtained from any CIMB Bank Berhad branch.

The electronic product highlight sheet and Disclosure Document (including Supplementary Disclosure Document(s) (if any) are made available for information only.

A cooling-off right is only given to a customer who is a first time Member registered with PPA who is investing in PRS Scheme with any PRS provider. However, CIMB-Principal Asset Management Berhad's staff and person(s) registered to deal in private retirement scheme of CIMB-Principal Asset Management Berhad are not entitled to the cooling-off right. The exercise of the cooling-off right at any CIMB Bank Berhad branch must be within 6 business days from your initial contribution i.e. The date the application is received by CIMB-Principal Asset Management Berhad.

Customers may subscribe for PRS via CIMB Clicks. For redemption, switching, transfer or exercise of the cooling-off right under PRS, customers may proceed to any CIMB Bank branches in Malaysia. However, customers who are only allowed to subscribe their PRS scheme via CIMB Clicks, however, customers may proceed to any CIMB Bank branches in Malaysia.

Transaction(s) performed after 2.00pm will be processed by CIMB Principal Asset Management within two (2) business days from the next business day. CIMB-Principal Asset Management will process it within two (2) business days from the next business day (T+2) and it will be processed using the NAV per Unit for the next Business Day (T+2). For enquiries, please contact our Call Centre at 1 300 880 900 (within Malaysia) or +603-2322 1100 (from overseas).

Please enter your 6 digits TAC codes generated via TAC on service

TAC :

Note: Please re-login to change

4 (a) (xi) Click **Request** for TAC Code to be sent to your mobile

4 (a) (xii) Insert your **TAC code** that has been sent to your phone

4 (a) (xiii) Click **Submit**

## STEP 4 (b): How to Purchase PRS (Do-It-Myself)

You are in a secured site Logout

My Accounts ▾ My Investments ▾ Transfer ▾ Claim ▾ Pay ▾ Top Up ▾ Apply For ▾ More Stuff ▾ Settings ▾

My Investments ▸ Private Retirement Scheme ▸ Purchase

### Private Retirement Scheme Purchase

Your Current Risk Profile : Balanced (For more information, [Click Here](#))

PPA Number : PPA721226025113

PRS Account Number : 33390

Fund Manager : CIMB-Principal Asset Management

Pay From :

Contribution Amount : RM

Payment Schedule :  Now  Later  Single On  Recurring

Contribution Direction : Do it myself

4 (b) (iii) Select an account to pay from

4 (b) (iv) Insert your **Contribution Amount** e.g. RM10,000

4 (b) (v) Select the **Payment Schedule** e.g. Now

*"Contribution Direction" is by default and has been set during your latest PRS purchase.*



## STEP 4 (b): How to Purchase PRS (Do-It-Myself)

Fund Name	Allocation %	Amount Invested (RM)
CIMB-Principal PRS Plus Growth Class A <a href="#">Disclosure Document</a> , <a href="#">Product Highlight Sheet</a>	30	300.00
CIMB-Principal PRS Plus Equity Class A <a href="#">Disclosure Document</a> , <a href="#">Product Highlight Sheet</a>	40	400.00
CIMB-Principal PRS Plus Asia Pacific Ex Japan Equity Class A <a href="#">Disclosure Document</a> , <a href="#">Product Highlight Sheet</a>	30	300.00

\*Rollover any Fund Name to view its Minimum Purchase Amount.

**General Declaration & Terms and Conditions:**

6. **Liability**  
CIMB-Principal shall not be liable for any direct, indirect, special or consequential damages which may be suffered and/or to be suffered by the Applicant, such as but not limited to, loss of anticipated profits or other anticipated economic benefits, whatsoever or howsoever caused, whether in contract or in tort (which includes but is not limited to negligence), arising directly or indirectly in connection with or arising out of this Application and these terms and conditions.

7. **Indemnity**  
The Applicant hereby agrees to indemnify CIMB-Principal against all claims by third parties made against CIMB-Principal in connection with this Application and these terms and conditions relevant to this investment.

8. **Severability**  
Each of the provisions contained herein is severable and distinct from the others and if at any time more of such provisions is or becomes invalid, void and/or illegal the enforceability of the remaining provisions shall not be affected or impaired thereby.

9. **Acceptance**  
I, the undersigned, upon the heirs, personal representatives, successors in title and permitted assigns, hereby accept and agree to the terms and conditions of this Application and these terms and conditions to be governed by and construed in accordance with the Laws of Malaysia.

Accept  Decline

I hereby confirm that I understand the full nature of the Private Retirement Scheme and that I am not insured by any other insurance policy for the purpose of providing retirement benefits.

I hereby acknowledge that I have read, understood and agree to the terms and conditions of the product highlight sheet, Disclosure Document(s) (if any) and Terms and Conditions of the Private Retirement Scheme.

Transaction(s) performed after 2.00pm on the next Business Day (T+2) and it will be processed using the NAV per Unit for the next Business Day (T+2). For enquiries, please contact our Call Centre at 1 300 880 900 (within Malaysia) or +603-2295 6100 (from overseas).

To view the product highlights sheet, Disclosure Document (including Supplementary Disclosure Document(s) (if any) and the Pre-Investment Form issued by FIMM, Adobe Reader software is required. Please browse to <http://www.adobe.com> to download the software.

Customers may subscribe for PRS via CIMB Clicks. For redemption, switching, transfer or the exercise of any cooling-off right under PRS, customers may proceed to any CIMB Bank branches in Malaysia.

4 (b) (vi) Decide on the percentage of allocation to top up your existing funds, which have been invested during the previous subscriptions

4 (b) (vii) Read the **General Declaration & Terms and Conditions**

4 (b) (viii) Click **Accept**

4 (b) (ix) Tick the boxes to acknowledge that you understand the Terms and Conditions

4 (b) (x) Click **Submit**

## STEP 4 (b): Your PRS Purchase Confirmation (Do-It-Myself)

My Investments ▶ Private Retirement Scheme ▶ Purchase

**Private Retirement Scheme Purchase Confirmation**

Your Current Risk Profile : Balanced

PPA Number : PPA721226025113

PRS Account Number : 33390

4 (b) (xi) Check your purchase details

DO-IT-FOR-ME



DO-IT-MYSELF

## STEP 4 (b): Your PRS Purchase Confirmation (Do-It-Myself)

A printed copy of the product highlights sheet, Disclosure Document (including Supplementary Disclosure Document (s) (if any) and the Pre-Investment Form issued by FIMM can be obtained from any CIMB Bank Berhad branch.

The electronic product highlight sheet and Disclosure Document (including Supplementary Disclosure Document(s) (if any) are made available for information only.

A cooling-off right is only given to a customer who is a first time Member registered with PPA who is investing in PRS Scheme with any PRS provider. However, CIMB-Principal Asset Management Berhad's staff and person(s) registered to deal in private retirement scheme of CIMB-Principal Asset Management Berhad are not entitled to the cooling-off right. The exercise of the cooling-off right at any CIMB Bank Berhad branch must be within 6 business days from your initial contribution is. The date the application is received by CIMB-Principal Asset Management Berhad.

Customers may subscribe for PRS via CIMB Clicks. For redemption, switching, transfer or the exercise of the cooling-off right under PRS, customers may proceed to any CIMB Bank branches in Malaysia. Investors are only allowed to may subscribe their PRS scheme via CIMB Clicks. However, customers may proceed to any CIMB Bank branches in Malaysia. For redemption, switching, transfer or the exercise of the cooling-off right under the PRS, customers may proceed to at any CIMB Bank branches in Malaysia.

Transaction(s) performed after 2.00pm will be processed by CIMB Principal Asset Management Berhad on the next business day. CIMB-Principal Asset Management will process it within two(2) calendar days for Business Day (T+2) and it will be processed using the NAV per Unit for the next Business Day (T+2). For more information, contact our Call Centre at 1 300 880 900 (within Malaysia) or +603-2295 6100 (from overseas).

Available on the App Store | Get it on Google play | Backstory | Not Clicks App user yet? Download Clicks App to enjoy instant TAC generation hassle!

Please request for TAC and enter the number to proceed.

TAC:

Win a brand new BMW plus hourly cash back. [Click for more](#)

4 (b) (xii) Click **Request** for TAC Code to be sent to your mobile

4 (b) (xiii) Insert your **TAC** code that has been sent to your phone

4 (b) (xiv) Click **Submit**

STATUS

## STEP 5: Your Status of Purchase

CIMB Clicks

You are in a secured site [Logout](#)

My Accounts ▾ My Investments ▾ Transfer ▾ Claim ▾ Pay ▾ Top Up ▾ Apply For ▾ More Stuff ▾ Settings ▾

My Investments ▾ Private Retirement Scheme ▾ Status Enquiry ▾ [Select a service](#)

### Private Retirement Scheme Status Enquiry

Transaction Status

Your transaction(s) require 2-3 working days for approval. To view your Purchase Details, click on the Reference No.

Purchase(s)

Transaction Date/Time	Reference No.	Contribution Direction	PRS Account	Contribution Amount(RM)	Status
18-Aug-2015 17:46:15 PM	150818000003	Do it for me	33394	400.00	Successful

My Mailbox (1) [View All Accounts](#)

[Kwik Claims](#)

[View All Accounts](#)

5 (i) Your purchase details and status