

# DIRECT PURCHASE INSURANCE



## FACT SHEET SUPPLEMENTARY FORM

### Definitions and Requirements Relating to “Selected Client” & “Trusted Individual”

- 1) “Selected Client” is defined as any Client who meets any two of the following criteria:
  - (i) 62 years of age or older;
  - (ii) Not proficient in spoken or written English; or
  - (iii) Has below GCE ‘O’ level or ‘N’ level certifications, or equivalent academic qualifications.
- 2) Selected Client should be accompanied by a Trusted Individual (TI) when purchasing a DPI.
- 3) If the Selected Client is not accompanied by a TI, the client can still choose to purchase a DPI and the Life Insurer needs to remind the client:
  - (i) that the DPI is bought without financial advice;
  - (ii) that there is a 14-day free-look period; and
  - (iii) to check with a TI on the DPI bought within the free-look period.

#### I acknowledge that:

- (a) I have been briefed on the above 3 items by the Life Insurer and understood all of them.
- (b) I will check with a Trusted Individual on the DPI I have just bought within the next 14 days.

Name:

NRIC/ID:

Date:

Signature:

- 4) “Trusted Individual” (TI) is defined as:
  - (i) At least aged 18;
  - (ii) Possess at least GCE ‘O’ or ‘N’ level certifications or equivalent academic qualifications;
  - (iii) Be proficient in spoken or written English; and
  - (iv) Be a person who has the trust of the Selected Client.

#### I acknowledge that:

- I am familiar with Investment or Life Insurance Products.
- I have fulfilled the above definition and I am a Trusted Individual to (Client’s name)

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I consent to Aviva (and Aviva related group of companies) collecting, using and/or disclosing my personal data (whether contained in this form or from other sources; existing data in Aviva’s record or to be collected in future) for the purpose of issuing the relevant policy to the applicant insured including but not limited to underwriting, processing and/or administering the policy, for statistical, research, compliance, audit, regulatory and such other purposes as may reasonably be required. I also consent to Aviva (and

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Aviva related group of companies) transferring my personal data to Aviva related group of companies, service providers, reinsurers, suppliers or intermediaries, whether located in Singapore or elsewhere, for the above purposes.

For full detail of the purposes of collection, use and disclosure of personal data by Aviva, please visit <http://www.aviva.com.sg/pdpa.html>.

Name:

NRIC/ID:

Date:

Signature: