

REQUEST FOR CHANGE FORM (RFC)



IMPORTANT NOTE: Please note that for multiple transactions in one request or a few requests on Investment Linked Plan submitted on same day, we will facilitate the request in sequential basis on different valuation date, which could result in differences of valuation of Net Asset Value price. **For Investment-Linked certificate, changes cannot be backdated.**

A copy of the completed application with date of submission to Etiqa is **COMPULSORY** to be provided to Participant.

Certificate No. :	Date :
Participant :	IC No :
Person Covered :	IC No :

STATEMENT OF DECLARATION:

- I/We hereby understand and agree that the transaction(s) of unit(s) shall be determined by the valuation of the unit price as of the Acceptance Date and subject to the receipt of this application by the Etiqa Head Office on its business day and by 1pm ("Day received"), otherwise the Acceptance Date shall mean the next business day from the Day Received. I/We also understand that Etiqa shall only accept and process this application if all required information(s) and document(s) have been fully satisfied. (For Investment-Linked Certificate only).
- I/We hereby request that the above certificate be changed according to the following particulars marked after having read and understood all the (important) note and details on this page and overleaf.

Financial Alteration	Relevant Details	Non-financial Alteration	Relevant Details
F1 <input type="checkbox"/> Change Frequency of Contribution Payment	Change to: () Monthly () Quarterly () Half Yearly () Yearly	N1 <input type="checkbox"/> Change Method of Payment	Change to: () Credit/Debit Card () Bank Deduction (MBB/BSN) () Direct () Flex SmartSave (1%, 2%, 3% or 4%)
F2 <input type="checkbox"/> Change of Sum Covered	Change Basic/ Rider Sum Covered (RM): () Basic Plan From To () Rider From To	N2 <input type="checkbox"/> Change of Name, IC No. or Other Personal Details N3 <input type="checkbox"/> Request for Takaful Certificate Duplication	Please indicate reason:
F3 <input type="checkbox"/> Deletion of Rider	1. 2.	N4 <input type="checkbox"/> Change of Auto Credit Account No.	Bank : Account No:
F4 <input type="checkbox"/> Inclusion of Rider (with consent for Auto-Deduction of Units During Contribution Holiday and this is only applicable to Investment Linked Product)	1. 2. <u>Auto-Deduction of Units During Contribution Holiday</u> Note: Should you not agree to the auto deduction of units during Contribution Holiday, you may opt to apply to cancel your supplementary certificate(s) / rider(s) to reduce the amount of tabarru' charges deduction.	N5 <input type="checkbox"/> Change of Contact Details () Correspondence Address () Telephone No. () Email Address	
F5 <input type="checkbox"/> Change of Medical Plan/Rider	1. 2. Note: If you intend to change to a different medical and health takaful product, your new product application may be subject to underwriting, where the major exclusions such as new waiting periods and pre-existing conditions may be imposed.	N6 <input type="checkbox"/> Change of Signature () Certificate Owner () Person Covered	<div style="border: 1px dashed gray; width: 150px; height: 50px; margin: 0 auto;"></div> <p>New Signature's Specimen</p>
F6 <input type="checkbox"/> Change of Investment Linked Regular Contribution	Change (RM): From To	99 <input type="checkbox"/> Others (please specify)	

For Investment-Linked certificate only

I hereby acknowledge that I have read and understood the explanation regarding my certificate sustainability which will be or will not be impacted as per the quotation number if I proceed to perform the transaction that has been selected.

Signature of Witness Name	Signature of Participant / Person Covered Name	Signature of Assignee Name
IC No.	IC No.	IC No.
H/P No.	H/P No.	H/P No.

For Office Use Only | Date & Time Received at MBB / Branch (**MANDATORY FOR INVESTMENT LINKED**)

Important Note on Document Required for Alterations

Financial Alteration		Rules	Document Required
F1	Change of Frequency of Contribution Payment	<ol style="list-style-type: none"> Effective from next due date for new frequency of Contribution payment. RFC must reach Etiqa one month before the effective date of change. 	
F2	Change of Sum Covered	<ol style="list-style-type: none"> Effective from next due date. For increase of Basic or Rider Sum Covered: <ol style="list-style-type: none"> For Traditional plans, allowed within the first 6 months and effective from the Certificate Commencement Date. For Investment-linked plans, effective from next Certificate Anniversary Date. RFC must reach Etiqa one month before the effective date of change. 	Health Declaration Form to be completed - applicable only for increase of Basic or Rider Sum Covered.
F3	Deletion of Rider	<ol style="list-style-type: none"> Effective from next due date. RFC must reach Etiqa one month before the effective date of change. 	
F4	Inclusion of Rider	<ol style="list-style-type: none"> Effective from next Certificate Anniversary Date. RFC must reach Etiqa one month before the effective date of change. Auto-Deduction of Units During Contribution Holiday - only applicable to Investment Linked product. 	Health Declaration Form to be completed. - Marketing Illustration / Sustainability Quotation upon request
F5	Change of Medical Plan/Rider	<ol style="list-style-type: none"> Upgrade is disallowed for stop marketing plan. Effective from next certificate anniversary date. RFC must reach Etiqa one month before the effective date of change 	Health Declaration Form to be completed - for upgrade only
F6	Change of Investment Linked Regular Contribution	<ol style="list-style-type: none"> Decrease in contribution effective from next due date. Increase in contribution effective from next Certificate Anniversary Date. RFC must reach Etiqa one month before the effective date of change. 	For increase in Contribution, Health Declaration Form to be completed.
99	Others	Details of change. Subject to terms and conditions of plan.	Documentary proof may be required.
	Change of Medical Deductible Limit	<ol style="list-style-type: none"> Effective from next certificate anniversary date 	For Change to lower limit, required: <ol style="list-style-type: none"> Health Declaration Form to be completed. For IL certificate, Sustainability Quotation is required.
	Change of term (For traditional plans only)	<ol style="list-style-type: none"> Allowed within 6 months from the Certificate Commencement Date. Subject to terms and conditions of plan. 	Health Declaration Form to be completed.
Non-Financial Alteration		Rules	Document Required
N1	Change Method of Payment	Relevant supporting document.	() Credit/Debit Card Credit/Debit Card Authorisation (AutoPay) Form () Bank Deduction (MBB/BSN) Bank Auto Debit Application Form
N2	Change of Name, IC No. or Other Personal Details	Documentary proof is required.	Certified copy of Identity Card / Birth Certificate / Passport is required for change of name, IC No. or date of birth.
N3	Request for Takaful Certificate Duplication	Applicable only for Active Certificate.	Declaration Loss of Certificate with Stamp Duty duly stamped or affixed/attached with STAMP Certificate issued by LHDN.
N4	Change of Auto Credit Account No.		For Non Malaysians/Permanent Residents: Certified Copy of Passport
N5	Change of Contact Details		Details of change
N6	Change of Signature	Must be witnessed by Etiqa Branch Manager, Customer Service Executive or Personal Financial Advisor (Maybank).	Certified copy of Identity Card / Passport.
99	Others	Details of change. Subject to terms and conditions of plan.	Documentary proof may be required.