### **SERVICE GUIDE**



Sun Life Malaysia offers a comprehensive range of life insurance and Takaful products and services to Malaysians. If you intend to participate in a family Takaful product marketed by our agent, you can enjoy these value-added services.

### What services can you expect from our agent?



### **BEFORE YOU 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, 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 PARTICIPATE IN A TAKAFUL PLAN

### Assist you with completing the application

- Explain the importance of answering the questions in the 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 application form.
- Arrange for medical examination with our panel clinics, if required.

## 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 participated.
- Your contract documents will be delivered to you (by hand, via post or electronically) within 7 working days from the contract issuance date.

# 3

### **DURING THE TERM OF A TAKAFUL PLAN**

### Continuous contract servicing

- Assist in renewal of contract.
- Assist in submitting your service requests, e.g. contract modification, change of address and frequency of contribution payment. In the event that the agent is no longer with Sun Life Malaysia, we shall appoint a new agent for you.

### Assist you in making a claim

 Guide you through the standard procedures on how to file a claim.

### **SunAccess Client Portal**

Please visit our client portal at <a href="http://sunaccess.sunlifemalaysia.com/portal-ui/CUSTOMER/login">http://sunaccess.sunlifemalaysia.com/portal-ui/CUSTOMER/login</a> for online access to your contract information.

If you are not satisfied with the services of our agent or require additional support, please contact our Client Careline at 1300-88-5055 or email us at wecare@sunlifemalaysia.com.

### Sun Life Malaysia Takaful Berhad

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### Now, you can check the status of takaful agents at your finger tips!

