

# Application for Policy Loan

**Please complete your details**

**Policy Number** \_\_\_\_\_

**Policy Owner** \_\_\_\_\_

**Life Assured** \_\_\_\_\_

**Allianz Customer Service Centre**

Allianz Arena, Ground Floor  
 Block 2A, Plaza Sentral  
 Jalan Stesen Sentral 5  
 Kuala Lumpur Sentral  
 50470 Kuala Lumpur

Tel : 1 300 22 5542 /  
 1 300 88 2229\*

Email : customer.service  
 @allianz.com.my /  
 HSBC.customercare  
 @allianz.com.my\*

\*HSBC Bancassurance Customer

**Confirmation of application for policy loan**

I \_\_\_\_\_  
 of NRIC No. \_\_\_\_\_ wish to apply for a loan of  
 RM \_\_\_\_\_ under the above-mentioned policy.

**Country of Residence for Tax Purpose – Individual Customer (MANDATORY to fill up)**

Not applicable

Malaysia (if country of residence is Malaysia)

Malaysia (if country of residence is NOT Malaysia). Reason\*:  
 Work/Business  Trainee/ Intern/ Student  Others \_\_\_\_\_

Other Country (please specify below)  
**Country 1:** \_\_\_\_\_ Reason\*:  
 Work/Business  Trainee/ Intern/ Student  Others \_\_\_\_\_  
 Tax Identification Number (TIN): \_\_\_\_\_

**Country 2:** \_\_\_\_\_ Reason\*:  
 Work/Business  Trainee/ Intern/ Student  Others \_\_\_\_\_  
 Tax Identification Number (TIN): \_\_\_\_\_

\* It is mandatory to provide relevant supporting document eg. working visa, student visa, confirmation letter from employer/ education institution, business registration, certificate of residence, etc.

**Country of Residence for Tax Purpose – Entity Customer (MANDATORY to fill up)**

Not applicable

Malaysia

Other Country (please specify below)  
**Country 1:** \_\_\_\_\_ Reason\*:  
 Business  Others \_\_\_\_\_  
 Tax Identification Number (TIN): \_\_\_\_\_

Country 2: \_\_\_\_\_ Reason\*:  
 Business  Others \_\_\_\_\_  
 Tax Identification Number (TIN): \_\_\_\_\_

\*It is mandatory to provide relevant supporting document

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**Customer Declaration (Please specify the information which you would like to update)**

Title	<input type="checkbox"/> Mr <input type="checkbox"/> Miss <input type="checkbox"/> Madam <input type="checkbox"/> Others _____
Name (as per NRIC/BC/Passport)	_____
Marital Status	<input type="checkbox"/> Single <input type="checkbox"/> Married <input type="checkbox"/> Widow <input type="checkbox"/> Divorced
No. of Children	_____
Sex	<input type="checkbox"/> Male <input type="checkbox"/> Female
Residential Address	_____ _____ Postcode _____ Country of Residence _____
Mailing Address	_____ _____ Postcode _____ Country of Mailing _____
Mobile No. 1	_____-_____-_____ Country Code Area Code
Mobile No. 2	_____-_____-_____ Country Code Area Code
Office No.	_____-_____-_____ Country Code Area Code
House No.	_____-_____-_____ Country Code Area Code
Email Address	_____
Date of Birth	_____
Country of Birth	_____
New NRIC	_____
Old NRIC	_____
Passport No.	_____
Passport Expiry Date	_____

For Entity Customer Only	
Type of Entity	<input type="checkbox"/> Private/Public Limited Company <input type="checkbox"/> Partnership <input type="checkbox"/> Sole Proprietorship/Club/Society/Charity
No. of Certificate of Incorporation/ Partnership Cert/ Business Registration	
Country of Incorporation	
Country of Operations	
Citizenship/ Nationality	<input type="checkbox"/> Malaysian <input type="checkbox"/> Others _____

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#### Declaration To Comply with Relevant Requirements

I agree to disclose and allow the transfer of my personal and contact information including nationality, tax status or tax residencies ("Relevant Information") kept with the Company to any local and foreign regulatory or self-regulatory persons in any jurisdiction, or foreign government authorities ("Relevant Authorities") that the Company is obliged to comply with or choose to comply in its absolute discretion or to meet the requirements of the laws, regulations, guidelines or terms of an agreement with such Relevant Authorities that is in force or may be declared to be in force and as amended from time to time ("Relevant Requirements").

I also agree to cooperate with the Company to provide any information or documents as may be requested by the Company from time to time that is required for disclosure by the Company to any Relevant Authorities, in a timely manner and within a reasonable period of time. I undertake that I must promptly update the Company of any changes to the Relevant Information stated under this application.

I further agree and accept that in case I fail to disclose or update any change to the Relevant Information or submit any requested documents, the Company may, to the extent permitted under applicable law, take any step to ensure the Company's compliance with the Relevant Requirements including withholding payment of any amount due to me or my personal representatives under my policy in compliance with the Relevant Requirements and/or pay such amount withheld to the Relevant Authorities.

The Company is also entitled to claim, to the extent permitted by law, compensation for any loss, liability or damage which the Company may suffer as a result of my default as declared above.

## Direct Credit Account (E-Payment) Advice

### Account Holder's Authorisation

I hereby request and authorise Allianz Life Insurance Malaysia Berhad (ALIM) to directly credit any relevant payment due from any of my Policies with ALIM into my bank account upon ALIM's approval of this form. I agree that this request is governed by the Terms and Conditions as specified below.

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Bank Name \_\_\_\_\_  
Bank Account Holder's Full Name \_\_\_\_\_  
Bank Account No. \_\_\_\_\_  
Account Type [ ] Individual [ ] Joint (Primary holder)  
Mobile No. (compulsory) \_\_\_\_\_  
Email Address (compulsory) \_\_\_\_\_

### Important Notes

1. This option is to facilitate payment to be credited to your bank account directly ("Direct Credit") as the Policy Owner of the Policy as stated herein.
2. For this purpose, a copy of your NRIC/passport and your bank statement/first page of your bank account passbook with account details together is required for our verification purposes.
3. Direct Credit is only available for direct credit to banks participating in the Interbank Giro Payment System (IBG).
4. Direct Credit is not allowed for the following bank accounts:
  - I. Overseas bank account
  - II. Corporate bank account (for keyman policy, mortgage reducing term assurance policy)
  - III. Any local bank account that is not in the name of the Policy Owner as stated in this form
  - IV. Any joint bank account unless the Policy Owner is the primary joint account holder

### Terms & Conditions

In consideration of Allianz Life Insurance Malaysia Berhad ("ALIM") agreeing to accept my request for direct credit facility to my bank account, I agree and confirm that:

1. The payment into the Account shall be a valid discharge of ALIM's liability under the Policy.
2. ALIM shall not be held liable for any damages, losses, claims, costs and/or expenses which I may incur if the payment transaction is delayed or is not affected at all, or the payment is credited into an incorrect bank account due to incomplete or incorrect information provided by me in this form.
3. I shall immediately refund to ALIM in full any monies paid into the Account which I am not entitled to receive.
4. I hereby indemnify ALIM for any damages, losses, claims, costs and/or expenses incurred by ALIM arising from or in connection with payments made to the Account in accordance with my instructions herein.
5. ALIM reserves the right to release payment by cheque if ALIM finds that any information and/or document(s) provided in or submitted with this form is incomplete, invalid and/or inconsistent.
6. The information provided by me may be disclosed to relevant third parties for the purpose of this form and in compliance with any legal or regulatory requirements.
7. ALIM may update my contact details on the information provided in this form.



**Allianz Life Insurance Malaysia Berhad** (1983010008983)  
(Licensed under the Financial Services Act 2013 and regulated by Bank Negara Malaysia)

Signed at \_\_\_\_\_ this \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_  
*Place Day Month Year*

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**Allianz Life Insurance Malaysia Berhad – Head Office**  
Level 29, Menara Allianz Sentral  
203, Jalan Tun Sambanthan  
Kuala Lumpur Sentral  
50470 Kuala Lumpur

Tel : 603 2264 1188/0688  
Fax : 603 2264 1199  
Website : allianz.com.my

\_\_\_\_\_  
Signature of Policy Owner/  
Assignee

Name: \_\_\_\_\_

\_\_\_\_\_  
NRIC: \_\_\_\_\_

\_\_\_\_\_  
Signature of Trustee

Name: \_\_\_\_\_

\_\_\_\_\_  
NRIC: \_\_\_\_\_

\_\_\_\_\_  
Signature of Trustee

Name: \_\_\_\_\_

\_\_\_\_\_  
NRIC: \_\_\_\_\_

\_\_\_\_\_  
Signature of Witness

Name: \_\_\_\_\_

\_\_\_\_\_  
NRIC: \_\_\_\_\_

\_\_\_\_\_  
Signature of Witness

Name: \_\_\_\_\_

\_\_\_\_\_  
NRIC: \_\_\_\_\_

\_\_\_\_\_  
Signature of Witness

Name: \_\_\_\_\_

\_\_\_\_\_  
NRIC: \_\_\_\_\_

Please ensure that the below documents/requirements are submitted/completed:  
✓ Application for Policy Loan Form  
✓ Policy Loan Agreement  
✓ Signature of policy owner/ assignee/ and trustee(s)  
✓ Proof of age for policy owner/ assignee and life assured (photocopy of NRIC or birth certificate)