

Script / Questions	Remarks
<b>GENERAL</b>	
<p><b>1. Good morning/ afternoon/ evening, may I speak to [Salutation] [Client's name] please?</b>  早上好/下午好/晚上好, 请问您是[客户的名字] [称呼]吗?  Zǎoshang hǎo/xiàwǔ hǎo/wǎnshàng hǎo, qǐngwèn nín shì [kèhù de míngzì] [chēnghu] ma?</p>	
<p><b>2. My name is [name of Supervisor] and I am the Supervisor of [Name of Adviser] calling on behalf of PIAS - Professional Investment Advisory Services.</b>  我是 [姓名], 代表 PIAS - Professional Investment Advisory Services 打这通电话给您。我是 [顾问代表姓名] 的上司。  Wǒ shì [xìngmíng], dài biǎo PIAS - Professional Investment Advisory Services dǎ zhè tōng diànhuà gěi nín. Wǒ shì [gùwèn dài biǎo xìngmíng] de shàngsī.</p>	
<p><b>3. This is a call-back regarding your recent policy purchase with your adviser [Adviser's Name]. Can I have a few minutes of your time?</b>  这是关于您最近与您的顾问代表[顾问姓名]购买的保单。会需要您几分钟的时间, 请问现在方便通话吗?  Zhè shì guānyú nín zuìjìn yǔ nín de gùwèn dài biǎo [gùwèn xìngmíng] gòumǎi de bǎodān. Huì xūyào nín jǐ fēnzhōng de shíjiān, qǐngwèn xiànzài fāngbiàn tōnghuà ma?  [Wait for client's acknowledgement]</p>	
<b>VERIFICATION</b>	

<p><b>4. As I will be disclosing your policy details, I will need to do a simple verification.</b></p> <p>由于我们将透露关于您购买的保单的一些详情，我们需要先进行一项简单的身份确认。</p> <p>Yóuyóu wǒmen jiāng tòulù guānyú nín gòumǎi de bǎodān de yīxiē xiángqíng, wǒmen xūyào xiān jìnxíng yī xiàng jiǎndān de shēnfèn quèrèn.</p> <p><i>[Ask TWO of the following verification Questions]</i></p> <p><b>a) May I have your Date of Birth please?</b> 请问您的出生日期是? Qǐngwèn nín de chūshēng rìqí shì?</p> <p><b>b) May I have your Adviser's name please?</b> 请您提供您顾问的姓名 Qǐng nín tígōng nín gùwèn de xìngmíng.</p> <p><i>If any of the answer is wrong, please ask one more question ~ May I have your postal code please?</i> 请您提供您的邮政编码。 Qǐng nín tígōng nín de yóuzhèng biānmǎ.</p>	
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<p><b>5. Thank you [Salutation] [Client's name]. I will proceed to ask you a few questions to confirm on your recent policy purchase.</b></p> <p>谢谢[客户的名字][称呼]。我将向您确认您最近购买的保单的一些问题。</p> <p>Xièxiè [kèhù de míngzì] [chēnghu]. Wǒ jiāng xiàng nín quèrèn nín zuìjìn gòumǎi de bǎodān de yīxiē wèntí.</p>	<p>Please inform the client that the call will be recorded if made using a recorded line.</p>
<b>QUESTIONNAIRE</b>	

<p><b>1. According to our records, you have agreed to purchase the following product with PIAS Adviser [Adviser's Name]:</b>          根据我们的记录, 您同意与您的顾问代表[顾问姓名]购买以下产品:          Gēnjù wǒmen de jìlù, nín tóngyì yǔ nín de gùwèn dàibiǎo [gùwèn xìngmíng]          gòumǎi yǐxià chǎnpǐn:  <u>For Insurance / Medisave-Approved Policies</u></p> <ul style="list-style-type: none"> <li>Product Provider &lt;Product Name&gt;</li> <li>Product Provider &lt;Rider Name&gt;</li> </ul> <p><u>For Investment Account Opening with Subscription</u></p> <ul style="list-style-type: none"> <li>Name of Fund</li> <li>Investment Amount</li> </ul> <p><b>Can we confirm if that is correct?</b></p>	<p>Supervisor is required to read out Client's purchase</p> <p>If answer is <b>Yes</b>, proceed to <b>Question 2</b>          If answer is <b>No</b>, proceed to <b>Question 9</b></p>
<p>MODE OF SALES ADVISORY</p>	
<p><b>2. Is this your first purchase with your PIAS adviser?</b> 请问您是否是第一次与顾问代表购买保险吗?          Qǐngwèn nín shǐfǒu shì dì yī cì yǔ gùwèn dàibiǎo gòumǎi bǎoxiǎn ma?</p>	<p>If answer is <b>Yes</b>, proceed to <b>Question 3</b>          If answer is <b>No</b>, proceed to <b>Question 4</b></p>
<p><b>3. Did the Sales Advisory take place over Video Conferencing?</b> 请问销售咨询流程是使用视频会议进行吗?          Qǐngwèn xiāoshòu zīxún liúchéng shì shǐyòng shìpín huìyì jìnxíng ma?</p>	<p>If answer is <b>Yes</b>, proceed to <b>Question 5</b>          If answer is <b>No</b>, proceed to <b>Question 9</b></p> <p><b>Note: For MedisaveApproved Policies</b>          Sales Advisory <b>must</b> take place via Video Conferencing</p>
<p><b>4. Did the Sales Advisory take place over the phone or Video Conferencing?</b>          请问销售咨询流程是使用电话或视频会议进行吗?          Qǐngwèn xiāoshòu zīxún liúchéng shì shǐyòng diànhuà huò shìpín huìyì jìnxíng ma?</p>	<p><b>Note: For MedisaveApproved Policies</b>          Sales Advisory <b>must</b> take place via Video Conferencing.          If answer is <b>Phone</b>, proceed to <b>Question 9</b></p>
<p>FOR MEDISAVE-APPROVED POLICIES ONLY</p>	
<p><b>Script / Questions</b></p>	<p><b>Remarks</b></p>

<p><b>5. Did your Adviser inform you that premiums are deducted through CPF Medisave account and cash top-ups may be required in the event of failed deduction due to insufficient funds / increase in premiums?</b></p> <p>您的顾问是否有通知您投保金额将从您的公积金健保储蓄扣除，您也有可能需要以现金支付此保单如果健保储蓄里不够余额或者保险金额提高？</p> <p>Nín de gùwèn shìfǒu yǒu tōngzhī nín tóubǎo jīn'è jiāng cóng nín de gōngjījīn jiànbǎo chùxù kòuchú, nín yěyǒu kěnéng xūyào yǐ xiànjīn zhīfù cǐ bǎodān rúguǒ jiànbǎo chùxù lǐ bùgòu yú'è huòzhě bǎoxiǎn jīn'è tígāo?</p>	<p>If answer is <b>Yes</b>, proceed to <b>Question 6</b></p> <p>If answer is <b>No</b>, proceed to <b>Question 9</b></p>
<p><b>6. For Shield plans only - Did your Adviser inform you that if you have an existing Integrated Shield Plan with any other insurer, the purchase of any policy your Adviser recommend will automatically cancel your other policies, but your previous insurer will write to you and give you 30 days to change your mind?</b></p> <p>您的顾问是否有告知，如果购买了此保单您之前与其它保险公司的健保双全将自动取消。您之前的保险公司也会以书面通知您保单以取消并且会给您 30 天的时间更改您的决定。</p> <p>Nín de gùwèn shìfǒu yǒu gàozhī, rúguǒ gòu mǎi liǎo cǐ bǎodān nín zhīqián yǔ qítā bǎoxiǎn gōngsī de jiànbǎo shuāngquán jiāng zìdòng qǔxiāo. Nín zhīqián de bǎoxiǎn gōngsī yě huì yǐ shūmiàn tōngzhī nín bǎodān yǐ qǔxiāo bìngqiě huì gěi yǔ nín 30 tiān de shíjiān gēnggǎi nín de juédìng.</p>	<p>Skip Question 6 if client did not purchase a shield plan.</p> <p>If answer is <b>Yes</b>, proceed to <b>Question 7</b></p> <p>If answer is <b>No</b>, proceed to <b>Question 9</b></p>
<p><b>CONFIRMATION</b></p>	
<p><b>7. I wish to confirm that you have signed on the PIAS Non F2F Supplementary form and you have emailed your Adviser on the confirmation of your application on the products mentioned?</b></p> <p>请您确定您在补充表格上签名，并且通过电邮方式通知您的顾问您确认想购买的产品？</p> <p>Qǐng nín quèdìng nín yǒu zài bǔchōng biǎogé shàng qiānmíng, bìngqiě tōngguò diànyóu fāngshì tōngzhī nín de gùwèn nín quèrèn xiǎng gòumǎi de chǎnpǐn?</p>	<p>If answer is <b>Yes</b>, proceed to <b>Question 8</b></p> <p>If answer is <b>No</b>, proceed to <b>Question 9</b></p>
<p><b>END OF CALL</b></p>	

<p>8. These are all the questions that I have. Thank you for your time. We will proceed to submit your application.</p> <p><b>*For Aviva plans only - After submitting your application, you may also receive a call from Aviva.</b></p> <p>谢谢您宝贵的时间, 以上是全部需要咨询的问题。如果您没有其他的问题, 我将会提交您的申请书。</p> <p>*提交后, 您也有可能收到 Aviva 的来电。</p> <p>Xièxiè nín bǎoguì de shíjiān, yǐshàng shì quánbù xūyào zīxún de wèntí. Rúguǒ nín méiyǒu qítā de wèntí, wǒ jiāng huì tíjiāo nín de shēnqǐng shū.</p> <p>*Tíjiāo hòu, nín yěyǒu kěnéng shōu dào Aviva de láidiàn.</p>	
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<p>[End of call. Please proceed with submission to Business Support.]</p>	
<b>FOR ADVERSE FINDINGS</b>	
<p>9. I will inform the Adviser to contact you directly. Thank you for your time.</p> <p><b>Goodbye.</b> 我会通知您的顾问代表让他/她直接与您联络。谢谢您的时间。再见。</p> <p>Wǒ huì tōngzhī nín de gùwèn dài biǎo ràng tā/tā zhíjiē yǔ nín liánluò. Xièxiè nín de shíjiān. Zàijiàn.</p> <p>[End of call. Please return to Representative for follow up as necessary.]</p>	