

Important Notices:

- Supervisor to complete the **Roadshow Application Form** and submit to pias.bda@singlife.com and respective BDMS at least **15 days** prior to the commencement date of the Roadshow(s). Exceptions are to be handled on a case-by-case basis.
- Refer Events Marketing Handbook for FARs for application procedures.
- Roadshows conducted without PIAS approval amounts to unauthorized public prospecting.
- If for any reasons the roadshow is cancelled, please inform PIAS at pias.bda@singlife.com.

SECTION 1: DETAILS OF EVENT APPLICANT(S)					
Supervisor Name / PIAS code:		Branch/Group Name:			
Contact No.		Alternate Contact No.			
SECTION 2: SUMMARY OF EVENT					
Featured Product Provider(s)					
Product Category	<input type="checkbox"/> Life Insurance	<input type="checkbox"/> General Insurance	<input type="checkbox"/> CIS	<input type="checkbox"/> Others: _____	
<p>Point to note The use of PIAS Financial Planner and the applicable point-of-sales documents is mandatory for all closed sales involving Life/CIS/A&H products at Roadshows</p>					
Start of Roadshow	<u>Date:</u>		<u>Time:</u>		
End of Roadshow	<u>Date:</u>		<u>Time:</u>		
SECTION 3: LOCATION ASSESSMENT					
Address of Location					
Specific location & Name of Event					
Questions: Provide floorplans, maps & pictures to support respond.	Details			Yes/No/NA	
Does Roadshow booked fit the amount of Tables & chair place at location according to guideline	[Measurement of Booth & Number of Tables/chairs]				
Number of PIAS Corporate banners/Booth					
Roadshow under shelter area?					
Roadshow under an individual cubicle?					

Shelter area permanent?		
Questions: Provide floorplans, maps & pictures to support respond.	Details	Yes/No/NA
With the Roadshow is there still sufficient space for public to walk around right without obstruction?		
Is there privacy for prospect base on the roadshow booth location?		
Does neighboring stall make the booth a conducive environment for sales? Highlight nature of stalls around.		

Roadshow Guide

Roadshow Booth size	Max Table	Max Chairs	Pull-Up Banners
2m X 1.5m (3 sqm)	2	4-6	1
3m X 3m (9 sqm)	3	9	1-2
7m X 3m (21 sqm)	12	36	2-4
6m X 6m (36 sqm)	15	45	4-5
9m X 9m (81 sqm)	20	60	4-5

SECTION 4: INCENTIVES & GIFTS

Incentive offered via tie-ups with Corporate or Retailer	<input type="checkbox"/> Yes	<input type="checkbox"/> No/NA
<u>Incentives Offered to Clients</u> a) For regular premium policies/ investments, the cost of incentives should not be more than 10% of the first year annual premium/ annual invested amount; b) For single premium policies/ investments, the cost of incentives offered should not be more than 1% of the single premium/ lump sum invested amount; c) No incentive is to be given for products that is paid from Client's CPF funds (including Medisave) or combined with Cash payment;	<input type="checkbox"/> Yes, please specify details of Mechanics	<input type="checkbox"/> No

<p>d) Incentives offered by PIAS, Branch and Product/Service Providers in aggregate cannot exceed the amount stipulated under sub-paragraphs (a) and (b); and</p> <p>e) Should the Product/Service Providers introduce new customer incentives, Representatives must ensure that sub-paragraph (d) is adhered to. In the event that the aggregate value of the incentives exceeds the cap stipulated in sub-paragraph (d), Representatives must withdraw the Branch incentives offered to clients.</p>		
<p>Gifts Offered to <u>Prospects</u></p> <p>(a) The value of the gift should be less than S\$10;</p> <p>(b) The gift must not be given in the form of cash, vouchers, or gift cards; and</p> <p>(c) No gift is to be given for recommending products that is to be paid from Client's CPF funds (including Medisave) or combined with Cash payment.</p>	<p><input type="checkbox"/> Yes, please specify details of Mechanics</p>	<p><input type="checkbox"/> No</p>
<p>Section 5: PULLER(S)</p>		
<p>Engagement of Puller(s)</p>	<p><input type="checkbox"/> Yes</p> <p><input type="checkbox"/> Number of Pullers _____</p>	<p><input type="checkbox"/> No</p>
<p>Type Of Puller(s) Arrangement</p>	<p><input type="checkbox"/> Individual</p>	<p><input type="checkbox"/> Corporate (Provide a copy of the Agreement)</p>
<p>Section 6: Marketing Material</p>		
<p>Are you using your own branch/Group Marketing Materials?</p>	<p><input type="checkbox"/> No</p>	
	<p><input type="checkbox"/> Yes</p> <p>Provide a valid approval code: _____</p> <p>Note: Only marketing materials that has an approval code and are still valid will be allowed at the Event/Roadshow</p>	

Section 7. Names Of Participating Duty Officer (DO)

ACKNOWLEDGEMENT AND DECLARATION (To be Ticked off by Director)					
<input type="checkbox"/> The Duty Officer(s) have been appointed by the Branch/Group Director for the Activity					
<input type="checkbox"/> Appointed Duty Officer attended the Duty Officer Training					
<input type="checkbox"/> Duty Officer is aware of their Roles and Responsibilities at the Event					
<input type="checkbox"/> Roadshow: Manpower Ratio - 1 DO for every 10 Participating FAR					
S/N	Name of FARs	FAR Code	Start Date / Time	End Date / Time	Signature
DO1					
DO2					
DO3					
DO4					
DO5					

Section 8. Names Of Participating FARs

DO	Name of FARs	FAR Code	Start Date / Time	End Date / Time
DO1				
DO2				

DO3				
DO4				
<p>A Supervisor's' assessment of the participating DO and FARs should be based on the following criteria:</p> <ul style="list-style-type: none"> a) FAR's balanced scorecard (BSC) grade; b) Any substantiated complaint(s) filed against the FARs previously; c) Any disciplinary action(s) taken against the FARs previously; and d) Any other relevant information gathered from the Company's due diligence conducted on the FARs, for example past results from mystery shopping / site visits / post-event surveys 				

Supervisor's Remark(s), if any

Section 9. ACKNOWLEDGEMENT AND DECLARATION

- ☐ I have read, understood, agree to all the guidelines prescribed in PIAS Event & Marketing Handbook for FARs, particularly, on public events.
- ☐ I understand and acknowledge that PIAS shall have the discretion to appoint a Mystery Shopper to attend the above-mentioned roadshow event, to determine the extent and frequency of checks to be conducted by the Mystery Shopper.
- ☐ I have assessed that all participating Duty Officer(s) ["DOs"] and FARs in the Roadshow have good compliance record before participating in the abovementioned event. The participating Duty Officer(s) and FARs have also read and understood all the guidelines prescribed in PIAS Event & Marketing Handbook for FARs.
- ☐ I declare that all DOs and FARs for the Roadshow event have completed all relevant trainings and will abide by the rules covered in the training.
- ☐ I declare that all the information provided in this form is true and accurate. I understand that any false and/or misleading information provided in this form may result in disciplinary actions taken by PIAS in accordance to the Section 11 of PIAS Event & Marketing Handbook for FARs.

Supervisor's Signature

Supervisor's Name

Date

Director's Signature

Director's Name

Date

Section 10. FOR OFFICIAL USE ONLY

☐ Approve ☐ Reject

Remarks

Name

Signature of Approver