

## **Post Event Survey Form [Applicable for Cat 2 Event(s) excluding Cat 2's worksite]**

This form shall serve as an assessment of the overall conduct of the event(s) held by PIAS and/or its Financial Adviser Representatives in accordance with the company's internal Event Guidelines that seeks to comply with the MAS *Guidelines on Standard of Conduct on Marketing and Distribution of Financial Products* [Ref : FSG-G02; Issue Date 23 December 2016].

We shall appreciate it if you can take a few moments to complete this Post Event Survey Form.

### **EVENT DETAILS**

Topic of Event	
Date of Attendance	

### **INDIVIDUAL PARTICULARS**

Name (Underline Surname)	Mr / Mrs / Ms / Mdm / Dr
Gender	M / F
Age	<input type="checkbox"/> 20 & below <input type="checkbox"/> 21 – 40 years <input type="checkbox"/> 41 – 50 years <input type="checkbox"/> 51 – 60 years <input type="checkbox"/> 61 years & above
Contact No.	
Email Address	
<input type="checkbox"/> Walk-in Guest <input type="checkbox"/> Invited Guest	

### **FINANCIAL ADVISORY PROCESS**

	Yes	No
1. At the conduct of this event, did any PIAS Representatives approach and provide advice or make recommendations on any product(s) personally to you on an individual basis?	<input type="checkbox"/>	<input type="checkbox"/>
2. At the conduct of this event, did any PIAS Representatives sell or attempt to sell any policy/product(s)? <i>For example, by asking you to complete application form(s) for any purchase of financial plan(s) or product(s).</i>	<input type="checkbox"/>	<input type="checkbox"/>
<p>If Yes, please specify</p> <p><b>Name of Representative:</b></p> <p><b>Reasons:</b></p>		

[illegible]

## **Post Event Survey Form [Applicable for Cat 2's Worksite & Cat 3 Event(s)]**

This form shall serve as an assessment of the overall conduct of the event(s) where any of the PIAS' Financial Adviser Representatives are invited speaker(s), in accordance with the company's internal Event Guidelines that seeks to comply with the MAS *Guidelines on Standard of Conduct on Marketing and Distribution of Financial Products* [Ref : FSG-G02; Issue Date 23 December 2016].

We shall appreciate it if you can take a few moments to complete this Post Event Survey Form.

### **COMPANY/ ORGANISER INFORMATION**

Name of Company/ Organizer	
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### **PARTICULARS OF COMPANY/ ORGANISER REPRESENTATIVE**

Name (Underline Surname)	Mr / Mrs / Ms / Mdm / Dr
Gender	M / F
Age	<input type="checkbox"/> 20 & below <input type="checkbox"/> 21 – 40 years <input type="checkbox"/> 41 – 50 years <input type="checkbox"/> 51 – 60 years <input type="checkbox"/> 61 years & above
Job Title/Designation	
Contact no.	
Office Email Address	

### **EVENT DETAILS**

Topic of Event	
Date of Event	

### **PARTICULARS OF INVITED SPEAKER(S)**

Name Of PIAS Financial Adviser Representative	
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### **FINANCIAL ADVISORY PROCESS**

	Yes	No
4. At the conduct of this event, did any of the speaker(s) who is/are PIAS Representative(s) personally approach and provide advice or make recommendations on any product(s) to any individual(s)?	<input type="checkbox"/>	<input type="checkbox"/>

If Yes, please specify

**Name of Representative:**

**Reasons:**

5. At the conduct of this event, did any of the speaker(s) who is/are PIAS Representatives sell or attempt to sell any policy/product(s)? *For example, by asking any of the attendees to complete application form(s) for any purchase of financial plan(s) or product(s).*

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If Yes, please specify

**Name of Representative:**

**Reasons:**

6. At the conduct of this event, did any of the speaker(s) who is/are PIAS Representatives ask any of the attendees to complete a Financial Planner regarding information such as monthly income, assets and liabilities, needs analysis, dependents' details etc.

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If Yes, please specify

**Name of Representative:**

**Reasons:**

**Comments:**

## **ACKNOWLEDGEMENT**

I understand, acknowledge and consent to PIAS processing, collecting and using my personal data provided by me in this form and from time to time, to PIAS and disclosing my personal data to Permitted Parties as per PIAS' Personal Data Notice and Consent Policy\*.

\* For details about PIAS' Personal Data Notice and Consent Policy, please visit <https://www.proinvest.com.sg/pdpa> . For withdrawal of consent for marketing via email and/ or postal mail, please contact PIAS Data Protection Officer for more information at [pias.dataprotection@singlife.com](mailto:pias.dataprotection@singlife.com)

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Signature and date