

MetLife Malaysia Mobile Application Development

# User Manual

V1.0

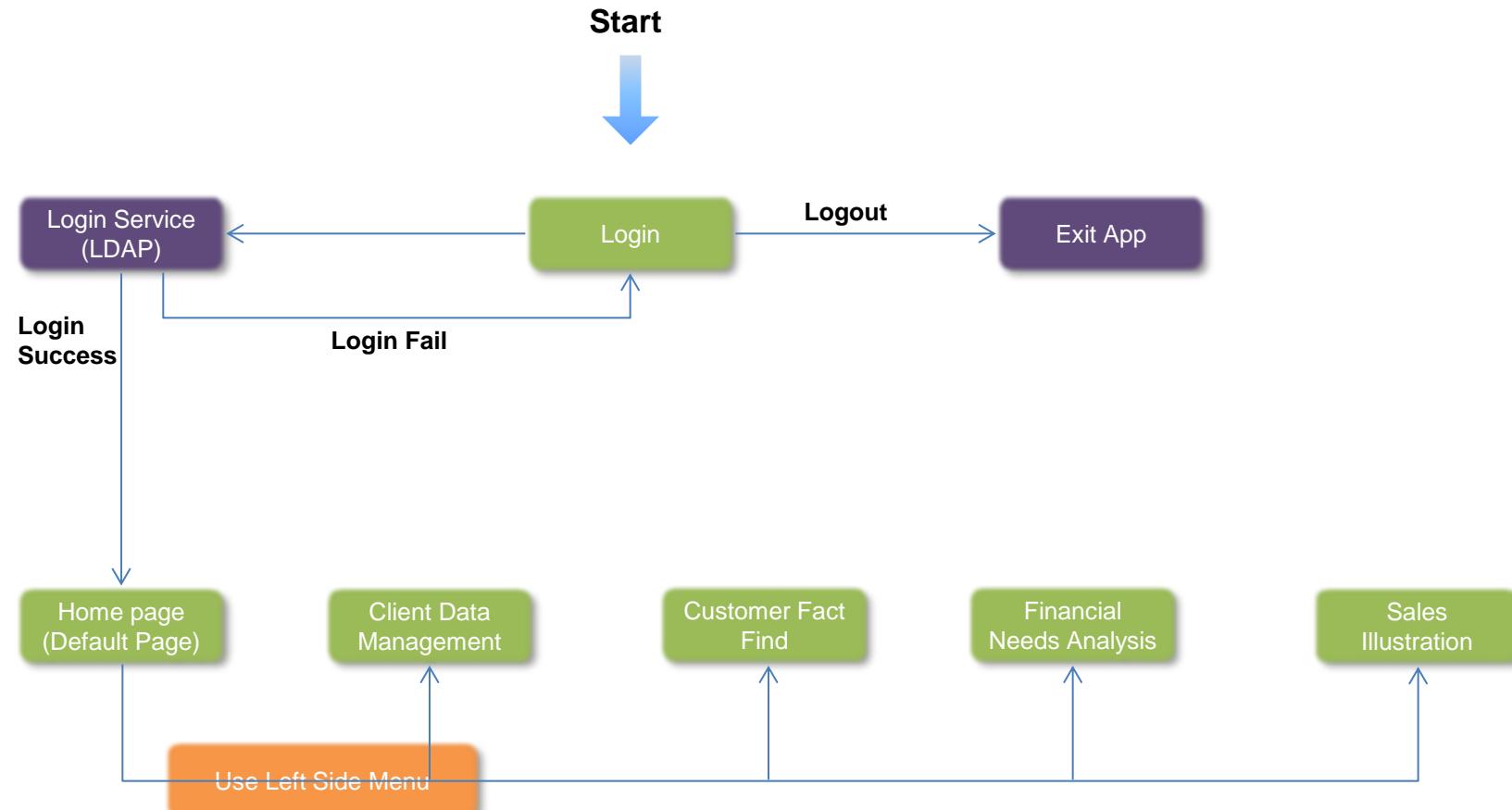
27. 11. 2014

# 1. Login & Main

1.1 Login

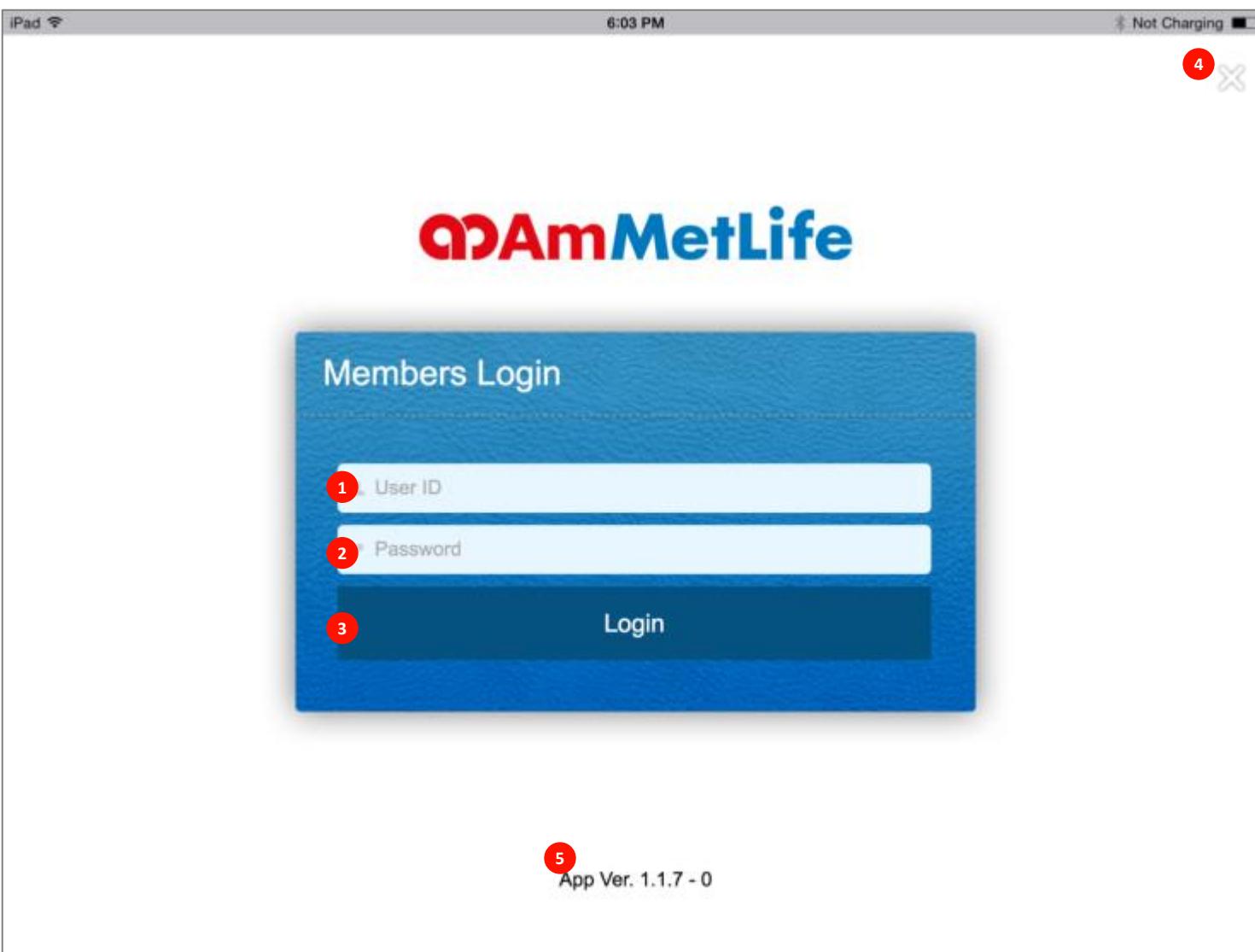
1.2 Main

# 1.Login & Main



# 1. Login & Main

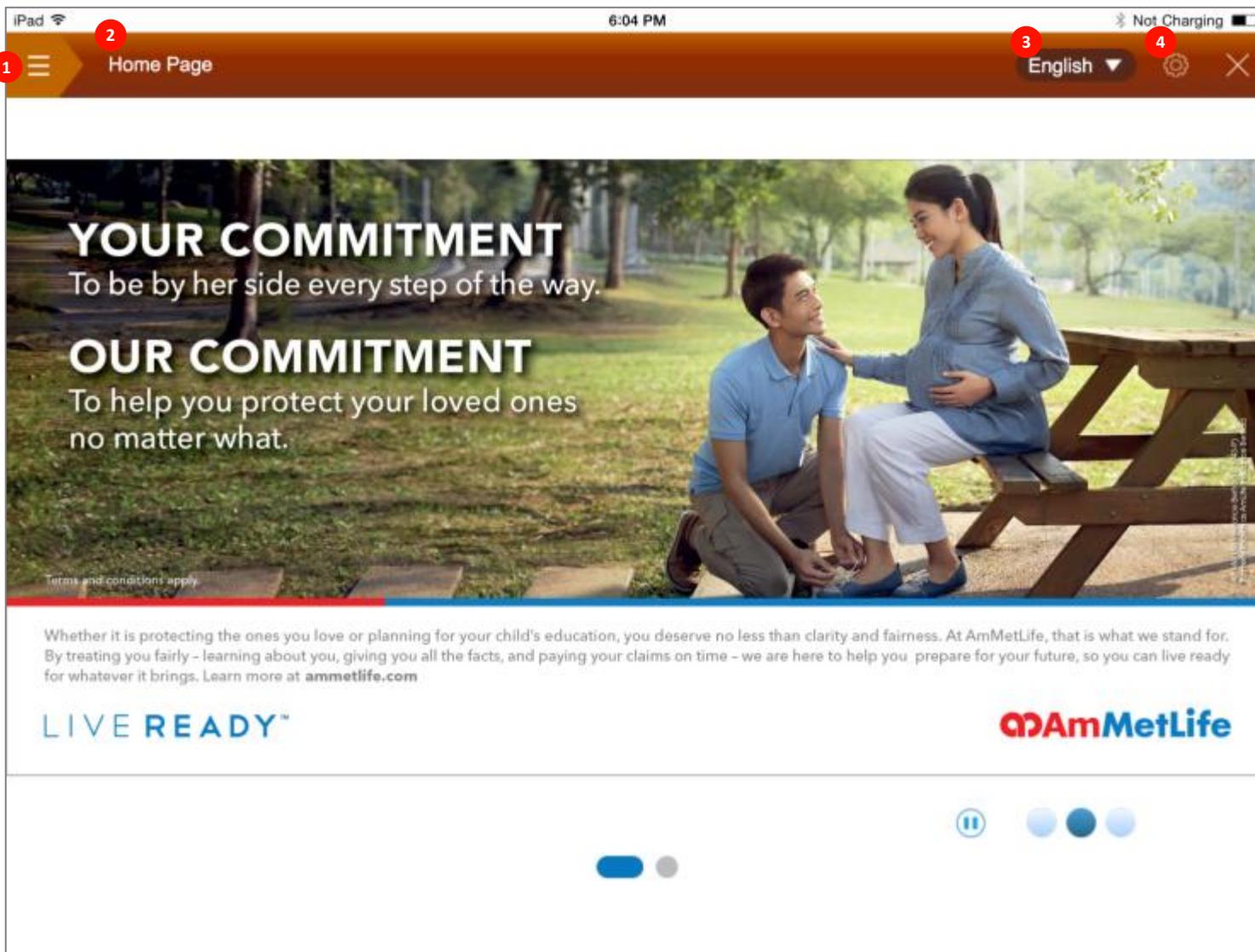
## 1.1 Login



Description	
*	Login to LDAP.
1	[ID] Input Box
2	[Password] Input Box : <ul style="list-style-type: none"><li>• Password are displayed in asterisks ("*)</li></ul>
3	[Login] Button
4	[X] Button : <ul style="list-style-type: none"><li>• Button to exit application</li><li>• Pop-up alert to confirm exit</li></ul>
5	Version info : <ul style="list-style-type: none"><li>• Show application &amp; contents version</li></ul>

# 1. Login & Main

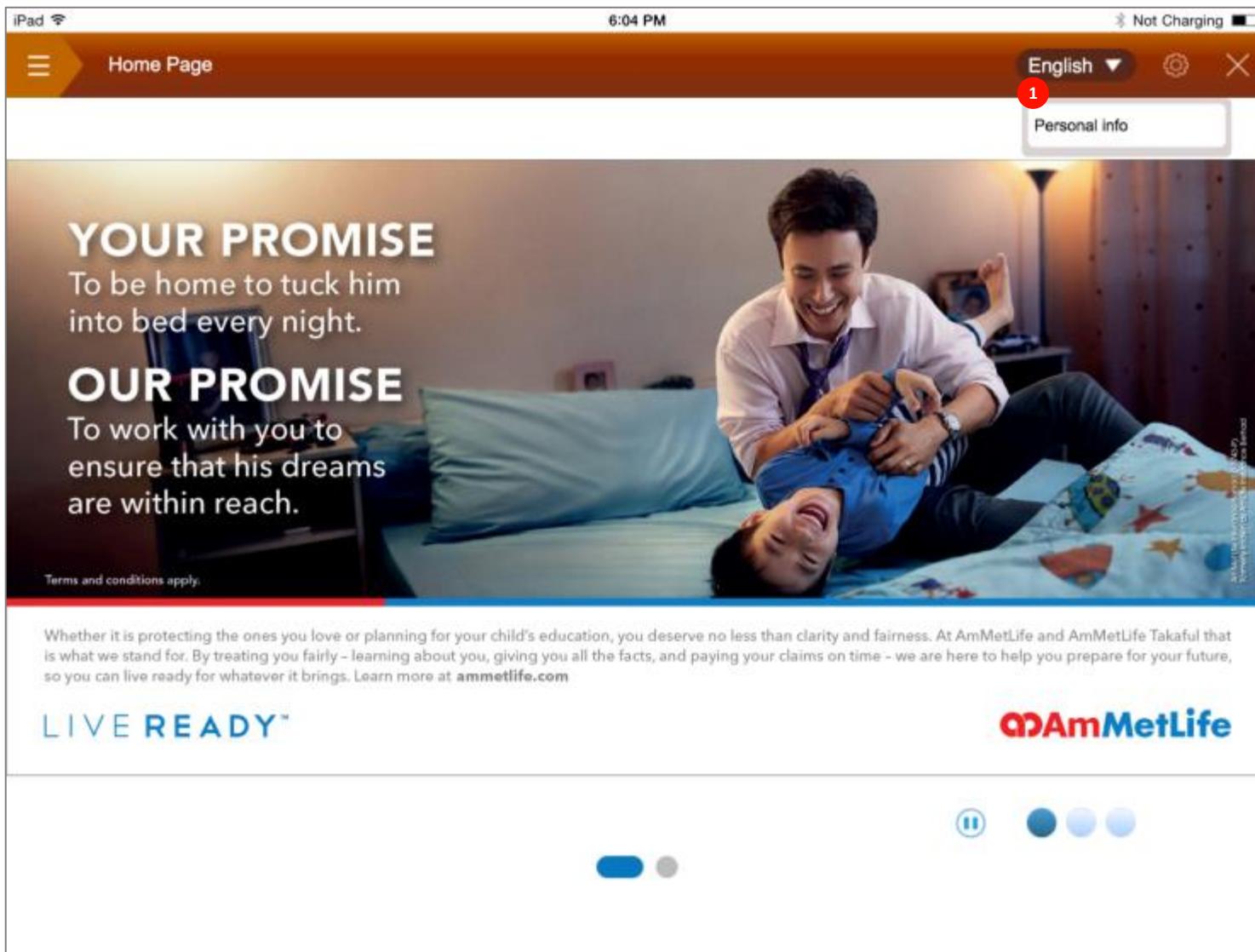
## 1.2 Main (Default : Home Page)



Description	
*	Homepage is shown after login. (Default Page)
1	[Menu] Button : <ul style="list-style-type: none"><li>Shows menu bar.</li><li>Home Page, Client Data Management, Customer Fact Find, Financial Needs Analysis, Sales Illustration</li></ul>
2	[Navigate] info <ul style="list-style-type: none"><li>Display name of current showing page.</li></ul>
3	[Language option] Dropdown : <ul style="list-style-type: none"><li>Shows selected option.</li><li>English, 中文, BM.</li></ul>
4	[option] Button : <ul style="list-style-type: none"><li>Shows options</li><li>Personal Info</li></ul>

# 1. Login & Main

## 1.2 Main (Clicked option button)

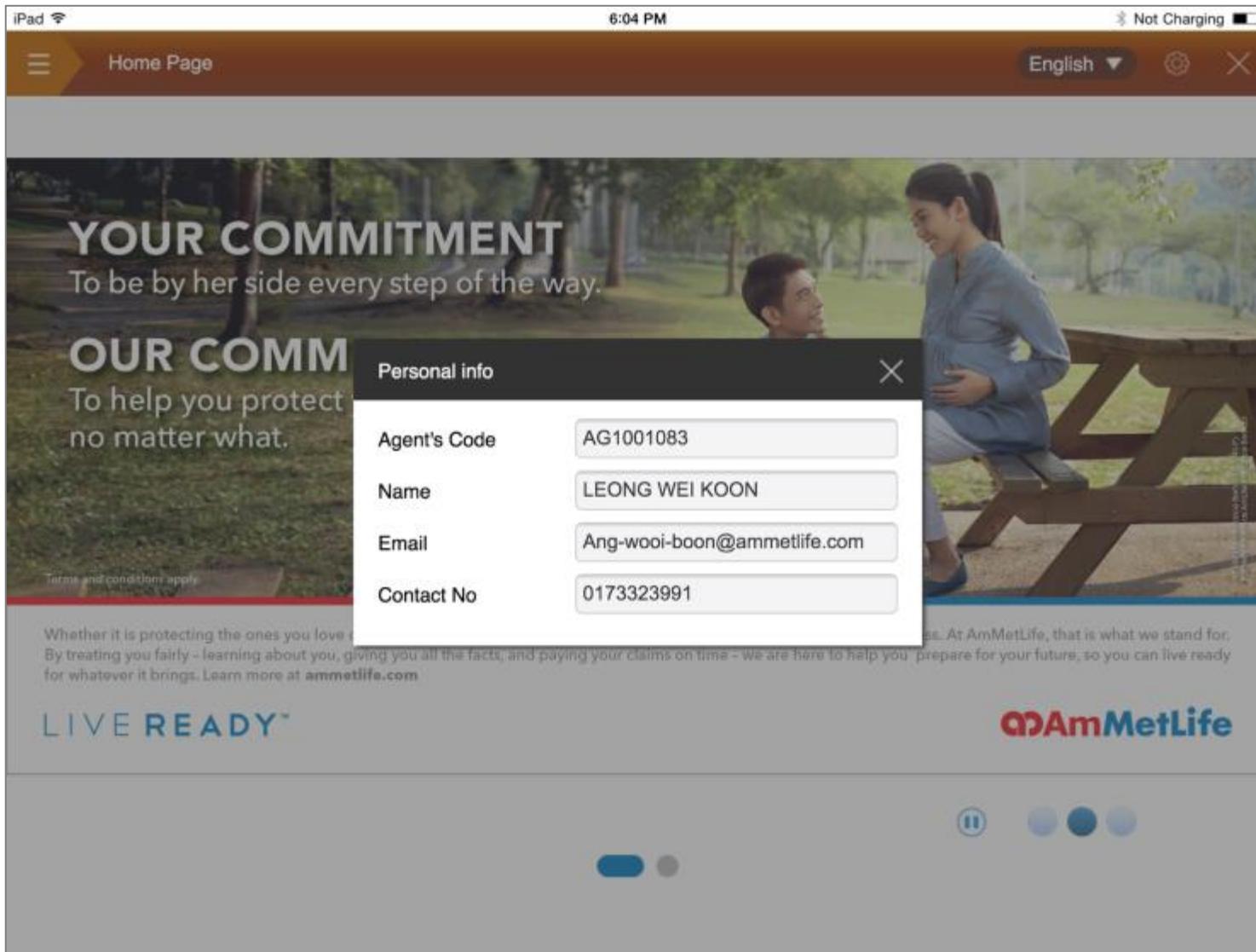


### Description

- |   |  |
|---|--|
| 1 | [Personal Info] Button :<br>• Display Personal Info Popup. |
|---|--|

# 1. Login & Main

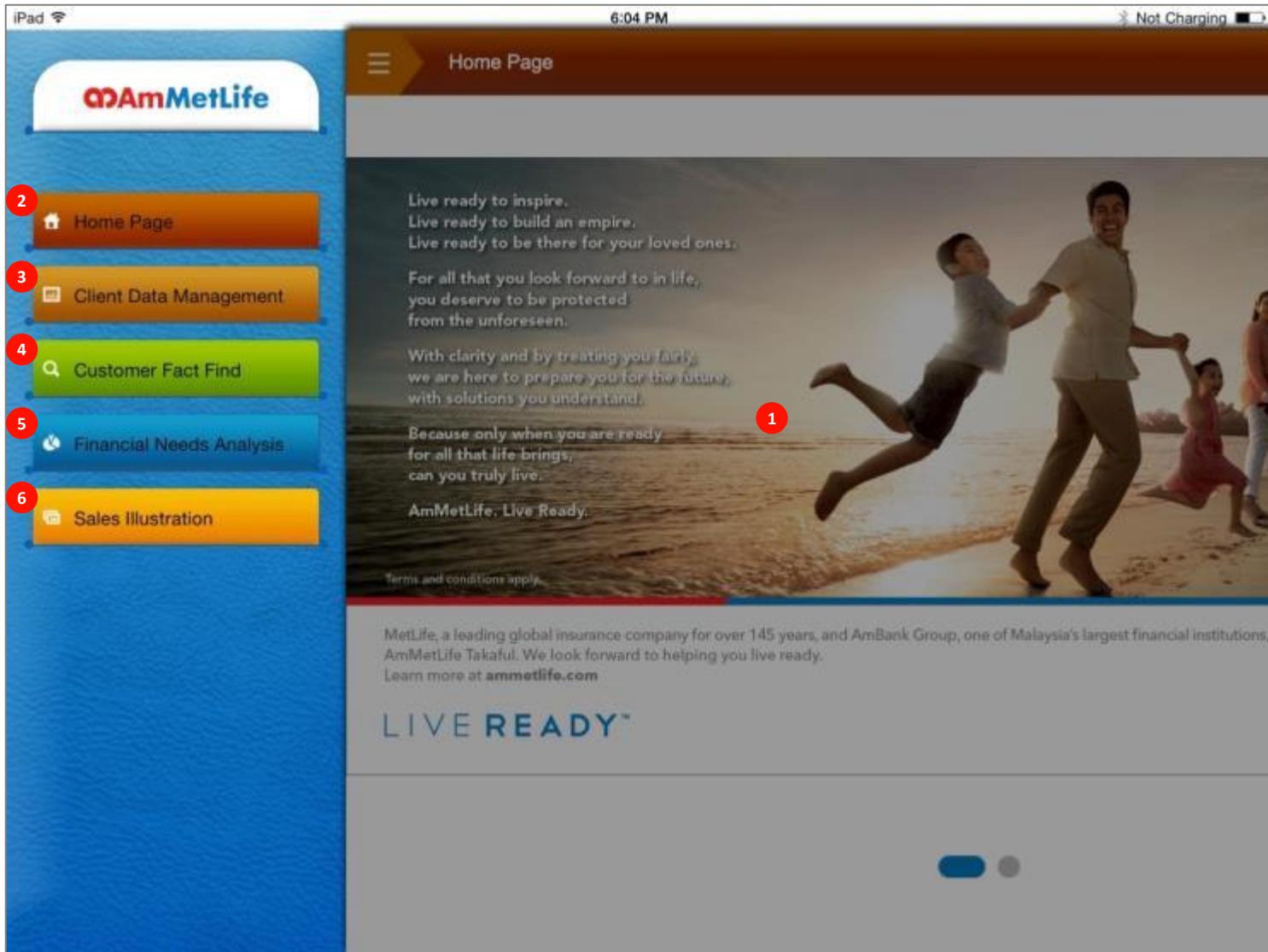
## 1.2 Main - Personal Info Popup



	Description
*	Display user info downloaded from LDAP. Can not edit.  Agent info will be populated in FNA, SIS, CFFF.

# 1. Login & Main

## 1.2 Main - Clicked Menu Button



Description	
*	When a module is entered from main menu, it will initialize data and start from fresh.
1	• Hide menu bar.
2	[Home Page] Button: • Go to Home Page.
3	[Client Data Management] Button: • Go to 'Client Data Management' page.
4	[Customer Fact Find] Button: • Go to 'Customer Fact Find' page.
5	[Financial Needs Analysis] Button: • Go to 'Financial Needs Analysis' page.
6	[Sales Illustration] Button: • Go to 'Sales Illustration' page.

## 2. Home Page

2.1 First Page

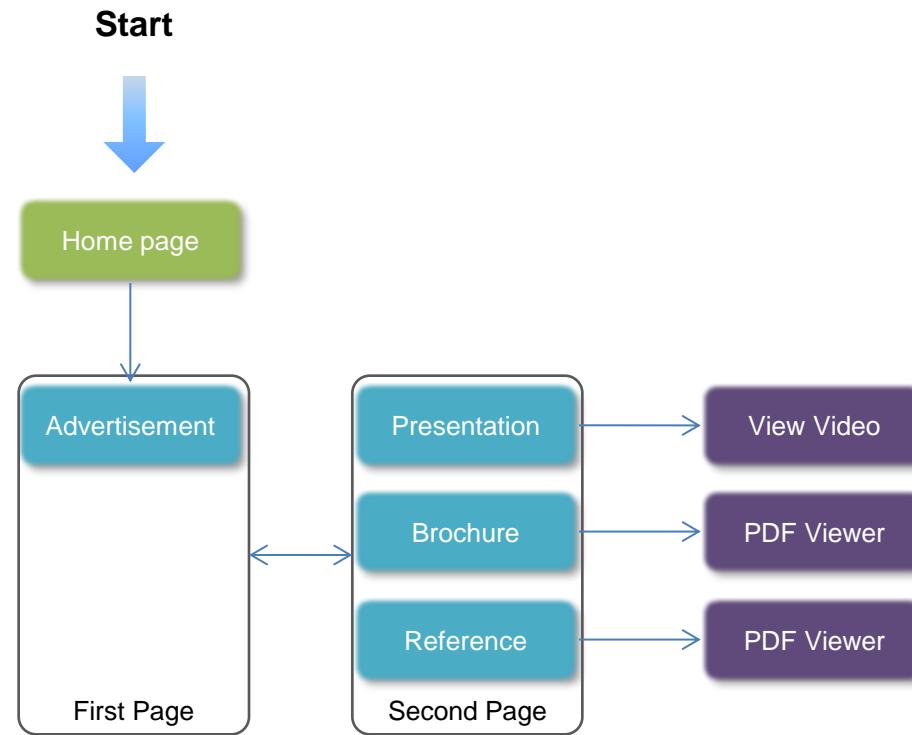
2.2 Second Page

2.3 Sales Presenter

2.4 Brochure

2.5 Reference

## 2. Home Page



## 2. Home page

### 2.1 First Page

The screenshot shows a mobile application interface for AmMetLife. At the top, there's a navigation bar with icons for signal strength, battery level, and connectivity. The title "Home Page" is displayed. The main content area features a photograph of a pregnant woman and her partner sitting on a park bench. Text overlays include "YOUR COMMITMENT To be by her side every step of the way." and "OUR COMMITMENT To help you protect your loved ones no matter what." A purple double-headed arrow points across the image. At the bottom, there's a message about protecting loved ones and planning for education, followed by the AmMetLife logo and the slogan "LIVE READY™". A footer section contains a play button icon and three colored dots (blue, grey, blue).

1 [Advertisement] area:  
• Advertisement image will auto-run.

2 [Advertisement image navigation]:  
• show selected advertisement image.

3 [Image auto-run / stop] Button:  
• advertisement images are auto-run or stopped.

4 [Home Page navigation]

5 [Image auto-run / stop] Button:  
• Move to the next page by flicking the screen.

## 2. Home page

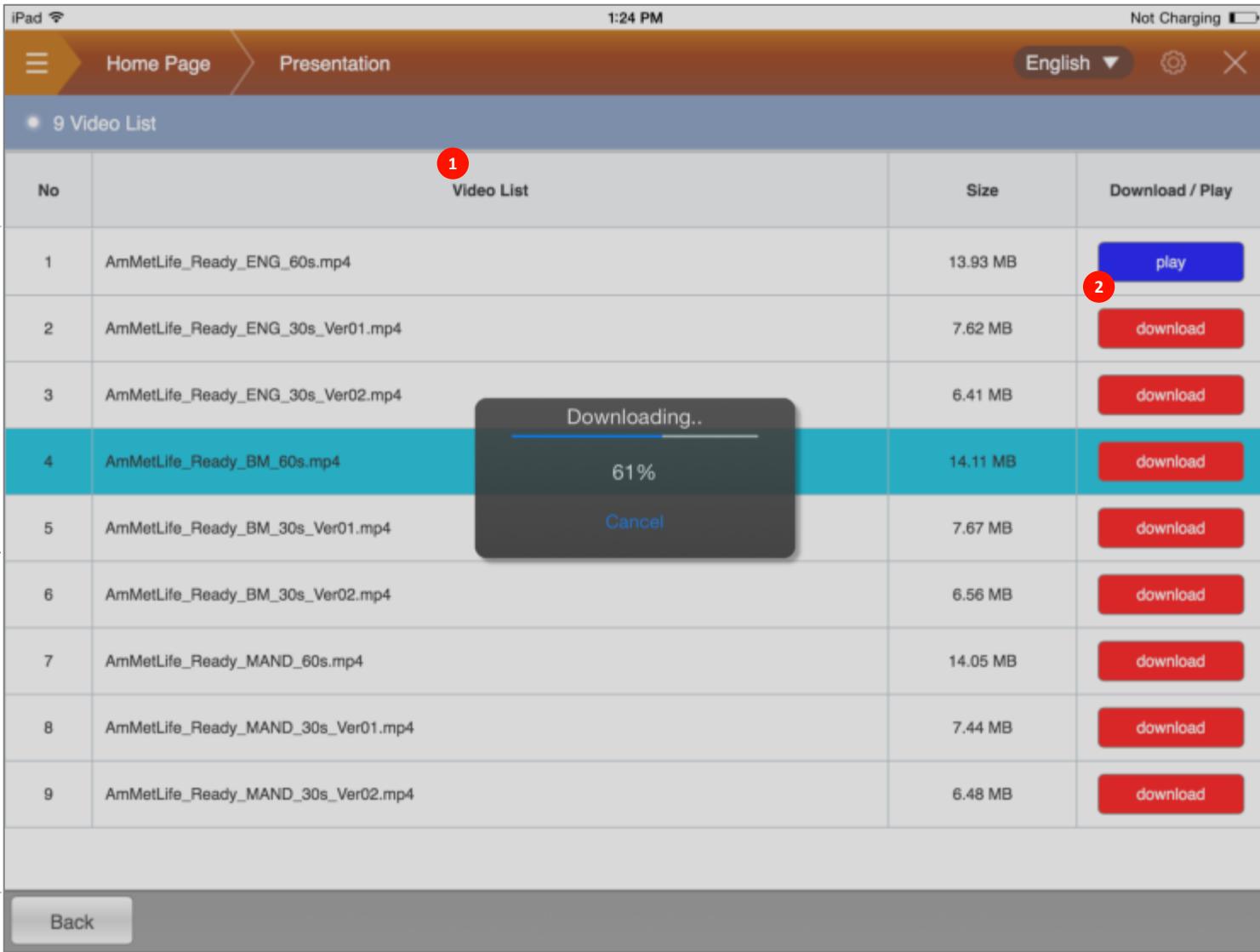
### 2.2 Second Page



Description	
1	[Sales Presenter] Button: • Go to 'Sales Presenter' page
2	[Brochure] Button: • Go to 'Brochure' page
3	[Reference] Button: • Go to 'Reference' page

## 2. Home page

### 2.3 Presentation



Description	
*	This module shows Presenter Video.
1	[Presentation Video] List: • Video list is displayed.
2	Video contents: • If video content is not downloaded before, MOS will prompt user to download the contents first. • If user download clicked, progress bar will appear to show download percentage. • If video content already exist in app, then popup will not be displayed. User can view the video file without download • If user selects cancel, download prompt popup will disappear and video title will be unselected. User needs to re-select the video they want to view.

## 2. Home page

### 2.3 Presentation - Video clip play window

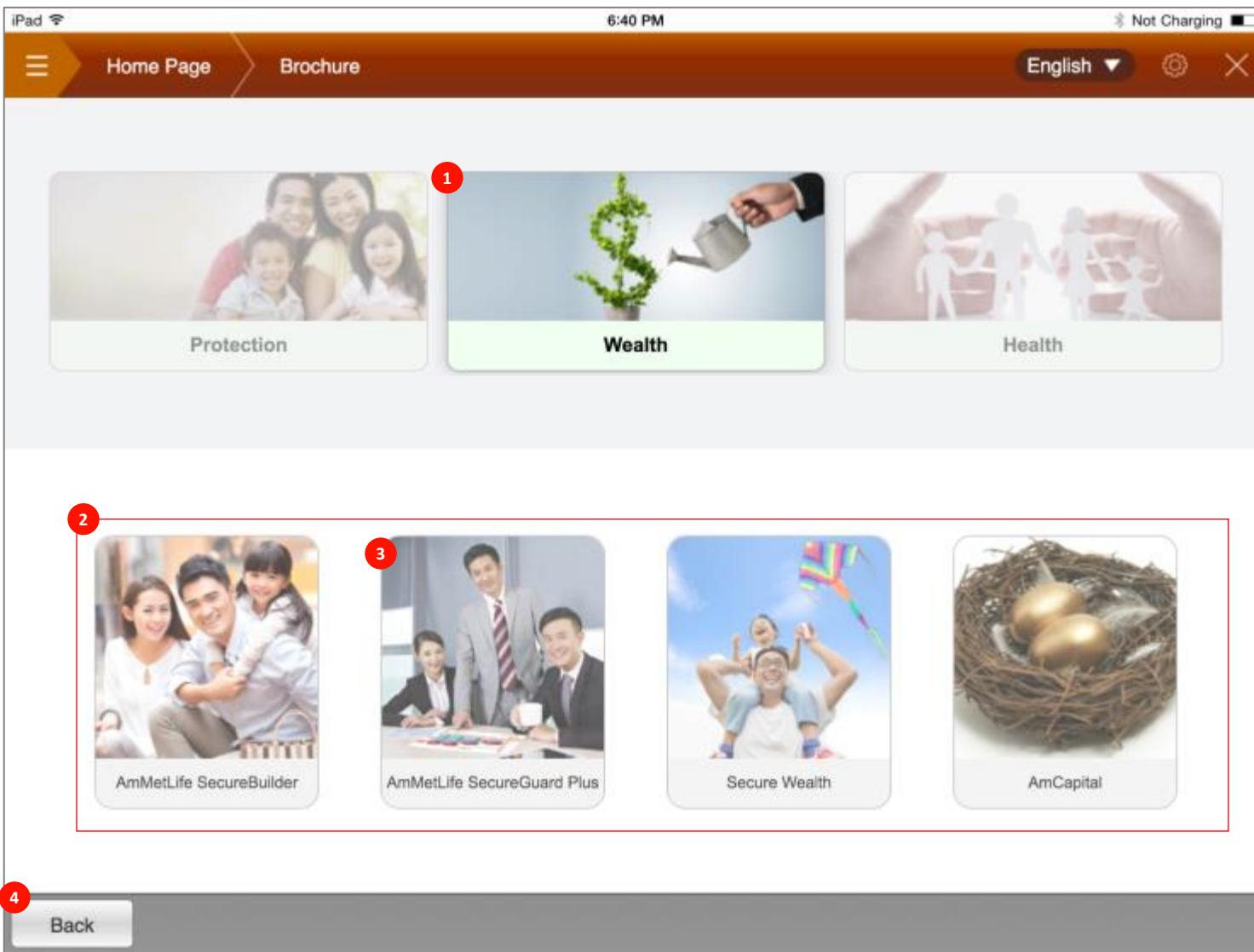


#### Description

- |   |  |
|---|--|
| * | Video clip play window: <ul style="list-style-type: none"><li>Once download is complete, user can play video file.</li></ul> |
|---|--|

## 2. Home page

### 2.4 Brochure



#### Description

- |   |  |
|---|--|
| * | This screen is a repository of all the relevant brochures in PDF format.   |
| 1 | [Category] Button: <ul style="list-style-type: none"><li>• Protection, Wealth, Health</li><li>• User can flick and select product pillar</li></ul> |
| 2 | Plan is shown at the bottom  |
| 3 | When a plan is selected, PDF will be displayed   |
| 4 | [Back] Button: <ul style="list-style-type: none"><li>• Go to 'Home Page'</li></ul>   |

## 2. Home page

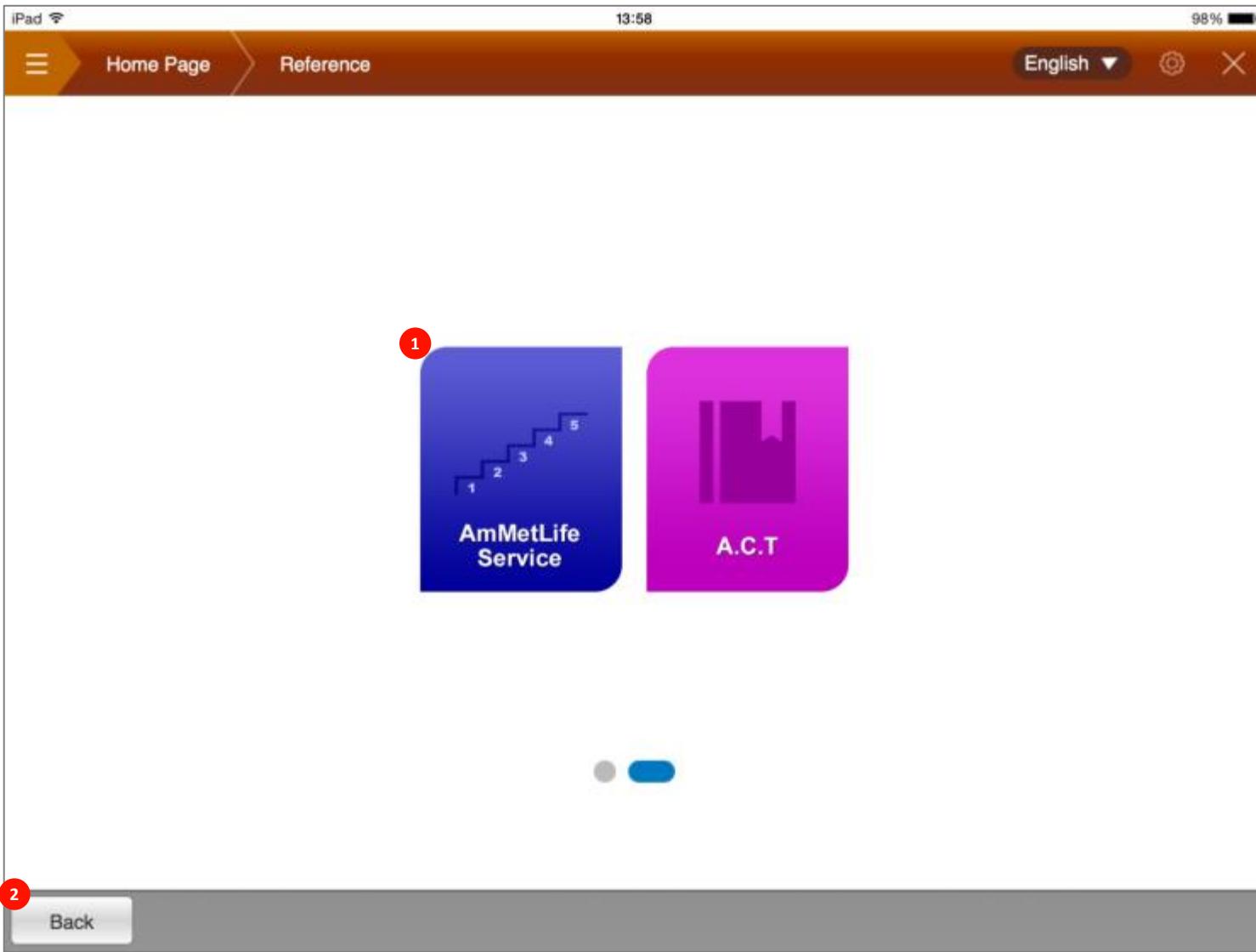
### 2.5 Reference (1/2)



Description	
1	<p>Reference item:</p> <ul style="list-style-type: none"><li>• Non-Medical Limit, Asset Allocation, Job Class, ILF Summary, AmMetLife Service, A.C.T pdf will be displayed.</li><li>• Panel Hospital will display Panel Clinic &amp; Hospital Filter popup</li></ul>
2	<p>[Back] Button:</p> <ul style="list-style-type: none"><li>• Go to 'Home Page'</li></ul>

## 2. Home page

### 2.5 Reference (2/2)



Description	
1	<p>Reference item:</p> <ul style="list-style-type: none"><li>• Non-Medical Limit, Asset Allocation, Job Class, ILF Summary, AmMetLife Service, A.C.T pdf will be displayed.</li><li>• Panel Hospital will display Panel Clinic &amp; Hospital Filter popup</li></ul>
2	<p>[Back] Button:</p> <ul style="list-style-type: none"><li>• Go to "Home Page"</li></ul>

## 2. Home page

### 2.5 Reference - Panel Clinic & Hospital Popup

The screenshot shows the 'Panel Clinic & Hospital' search results. The search parameters are highlighted with red circles:

- Hospital Type:** AmMetLife Medic Flexi Panel (marked with 1)
- State:** JOHOR (marked with 2)
- Result Row:** COLUMBIA ASIA HOSPITAL - NUSAJAYA (marked with 3)
- Bottom Button:** View PDF (marked with 4)

A vertical scroll bar is visible on the right side of the list, indicating it is scrollable.

Hospital/Clinic Name	Address	Contact No
COLUMBIA ASIA HOSPITAL - NUSAJAYA	PERSIARAN AFIAH, TAMAN KESIHATAN AFIAH,	07-233 9999
HOSPITAL PENAWAR	NO 17 & 18 (A-D), JALAN BANDAR, PUSAT PERNIAGAAN PASIR GUDANG	07-252 1800
KEMPAS MEDICAL CENTRE	LOT PTD 7522, JALAN KEMPAS BARU	07-236 8999
KLUANG UTAMA SPECIALIST HOSPITAL	NO 1, SUSUR 1, JALAN BESAR	07-771 8999
KPJ JOHOR SPECIALIST HOSPITAL	39-B, JALAN ABDUL SAMAD	07-225 3000
KPJ PASIR GUDANG SPECIALIST HOSPITAL	LOT PTD 204781, JALAN PERSIARAN DAHLIA 2, TAMAN BUKIT DAHLIA	07-257 3999

#### Description

- [Hospital Type] Dropdown:  
• AmMetLife MedicFlexi Panel Hospital / AmPreferred Panel Hospital / Panel Clinic
- [State] Dropdown:  
• ALL, Johor Bahru, Kedah Darul Aman, Kelantan Darul Naim, Negeri Sembilan, Pahang Darul Makmur, Penang , Perak Darul Ridzuan, Selangor Darul Ehsan, Terengganu Darul Iman, Sabah, Sarawak, Wilayah Persekutuan, Melaka, Perak Darul Ridzuan
- Doctor/Hospital info is filtered based on hospital type and state.
- [View PDF] Button:  
• PDF will display hospital list base on hospital type.

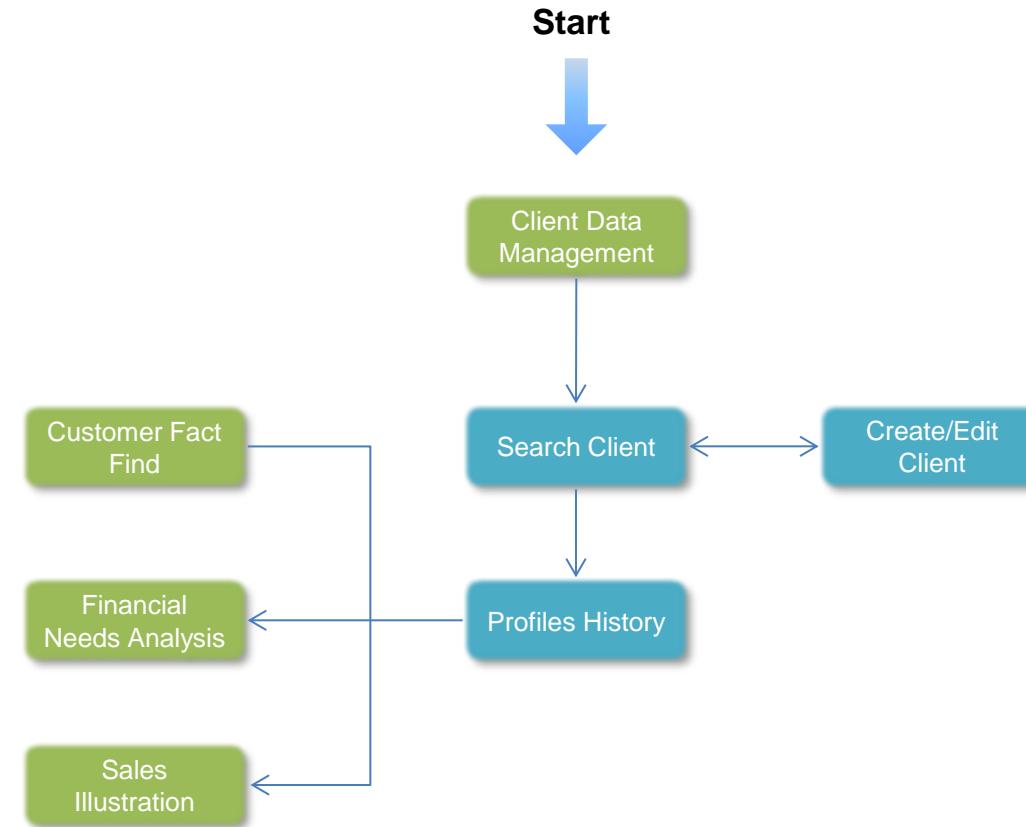
## 3. Client Data Management

3.1 Search Client

3.2 Create/Edit Client

3.3 Profiles History

# 3.Client Data Management



### 3. Client Data Management

#### 3.1 Search Client

iPad WiFi 6:41 PM Not Charging

### Client Data Management

English

Client Name DOB Reset Search

ANB Gender ALL

1 Client found

Create New Client View/Edit Delete

Name	ANB	DOB	Gender	Contact No
USER NAME	35	19-11-1980	Male	070-6253 9107

Profiles History

Scrollable

Description	
*	This module is a repository of all the relevant brochures in PDF format.
1	[Create New Client] Button: <ul style="list-style-type: none"><li>• Go to 'Create Client' page</li></ul>
2	[Edit] Button: <ul style="list-style-type: none"><li>• Default : disabled</li><li>• After select a client, be enabled</li></ul>
3	[Delete] Button: <ul style="list-style-type: none"><li>• Default : disabled</li><li>• After select a client, be enabled</li></ul>

### 3. Client Data Management

#### 3.1 Search Client

iPad WiFi 6:41 PM Not Charging

### Client Data Management

English

Client Name:  DOB:  Reset Search

ANB:  Gender: ALL

1 Client found

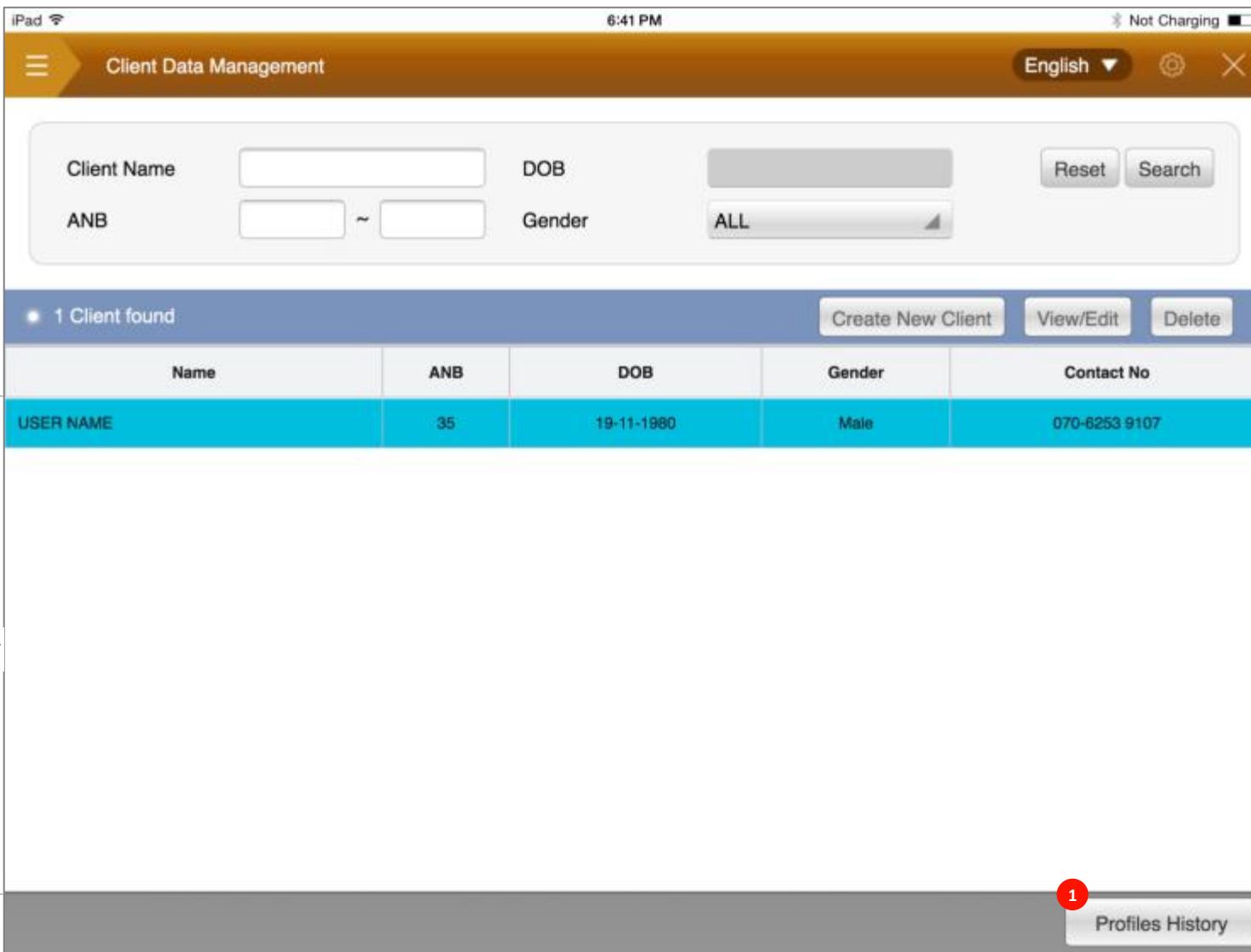
Name	ANB	DOB	Gender	Contact No
USER NAME	35	19-11-1980	Male	070-6253 9107

Create New Client View/Edit Delete

Profiles History

1

Scrollable



#### Description

- |   |   |
|---|---|
| * | This module is a repository of all the relevant brochures in PDF format.  |
| 1 | [Profiles History] Button: <ul style="list-style-type: none"><li>Default : disabled</li><li>After select a client, be enabled</li><li>Go to 'Profiles History' page</li></ul> |

### 3. Client Data Management

#### 3.2 Create/Edit Client

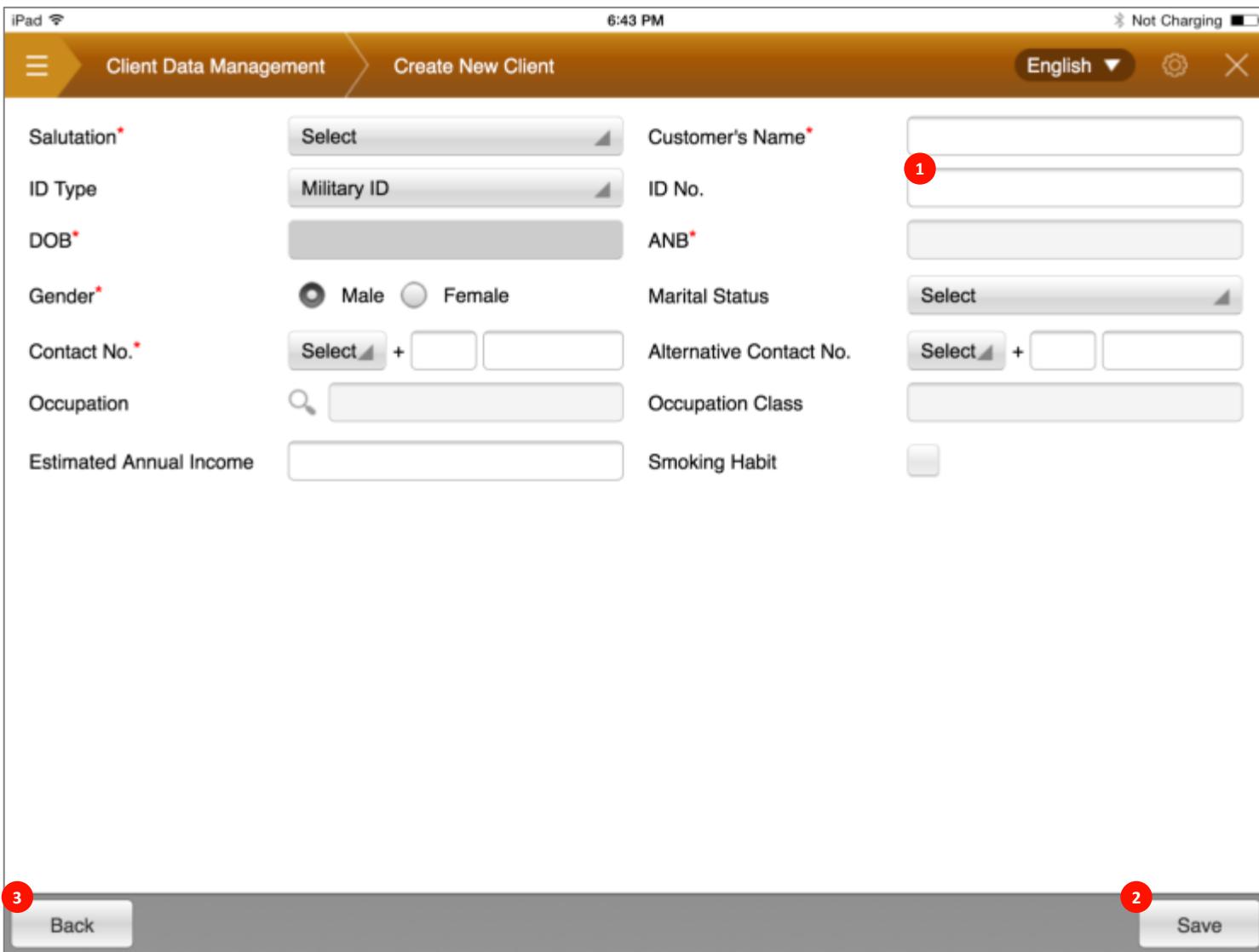
The screenshot shows the 'Create New Client' screen of the Client Data Management application. The top bar displays 'Client Data Management' and 'Create New Client'. The bottom navigation bar has 'Back' and 'Save' buttons.

Field	Type	Description
Salutation*	Select	1 [Salutation] Dropdown: Mandatory field : Salutation, Customer's Name, DOB, ANB, Gender, Contact No.
ID Type	Select	2 [ID Type] Dropdown: NRIC, Military ID, Police ID, Birth Certificate, Passport, Others
DOB*	Date Picker	4 [DOB] Date Picker: ANB is auto calculated.
Gender*	Radio Box	5 [Gender] Radio Box: Default: Male
Contact No.*	Select	7 [Contact Type] Dropdown: Home, Mobile, Office
Occupation	Search	8 [Occupation] Button: Display Search Occupation Popup
Estimated Annual Income	Text Input	Occupation Class is auto populated
Customer's Name*	Text Input	
ID No.	Text Input	3 [ID NO] Text input: If ID Type is NRIC, 3 input format will be displayed. For others, show free text input with 15 character length.
ANB*	Select	6 [Marital Status] Dropdown: Single, Married, Widowed, Divorced/Separated
Marital Status	Select	
Alternative Contact No.	Select	
Occupation Class	Text Input	
Smoking Habit	Text Input	

Description	
*	Mandatory field : Salutation, Customer's Name, DOB, ANB, Gender, Contact No.
1	[Salutation] Dropdown:
2	[ID Type] Dropdown: NRIC, Military ID, Police ID, Birth Certificate, Passport, Others
3	[ID NO] Text input: If ID Type is NRIC, 3 input format will be displayed. For others, show free text input with 15 character length.
4	[DOB] Date Picker: ANB is auto calculated.
5	[Gender] Radio Box: Default: Male
6	[Marital Status] Dropdown: Single, Married, Widowed, Divorced/Separated
7	[Contact Type] Dropdown: Home, Mobile, Office
8	[Occupation] Button: Display Search Occupation Popup
	Occupation Class is auto populated

### 3. Client Data Management

#### 3.2 Create/Edit Client - If ID Type is not NRIC



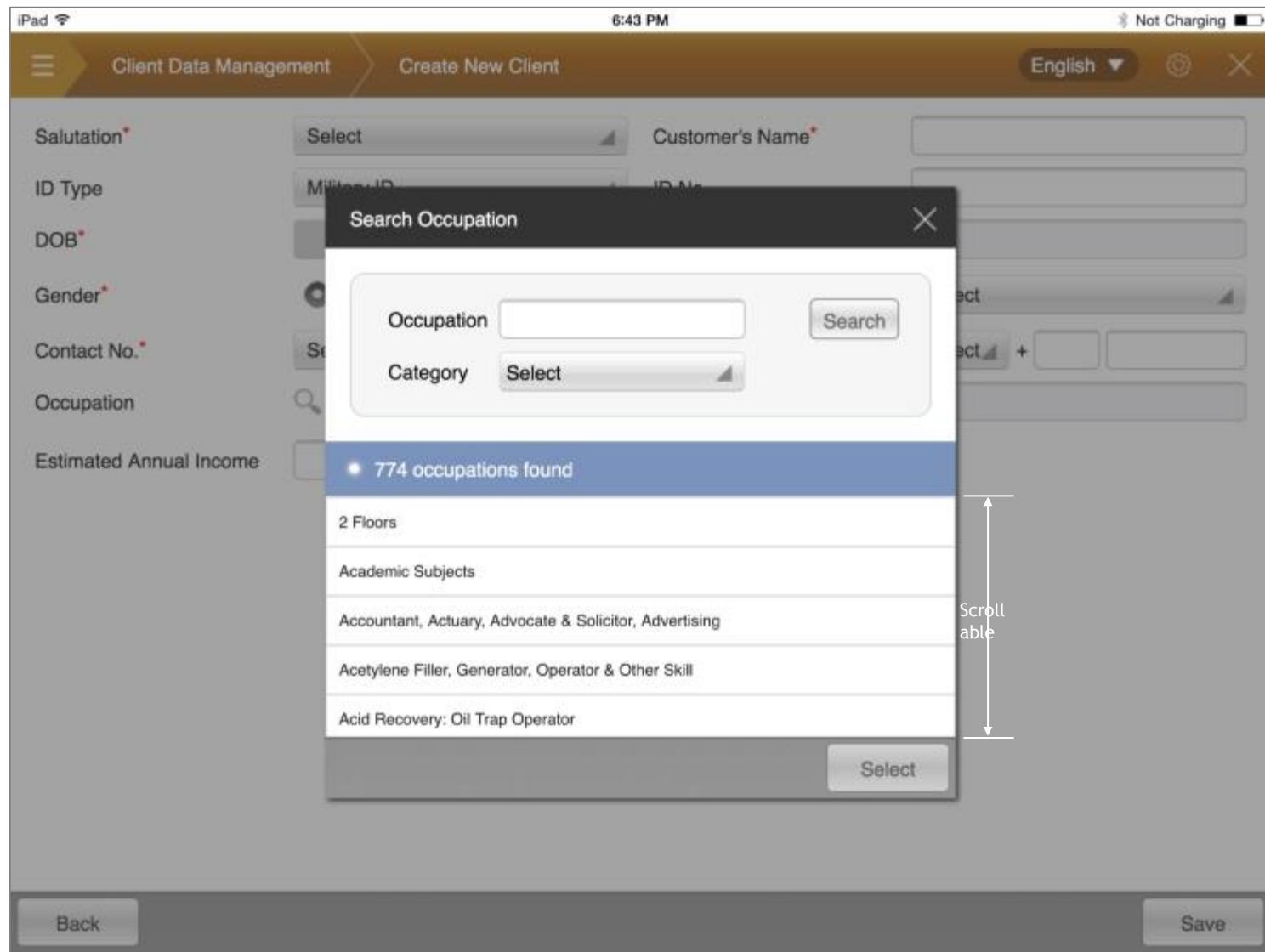
The screenshot shows the 'Create New Client' screen of the Client Data Management application. The top bar displays 'Client Data Management' and 'Create New Client'. The bottom navigation bar has 'Back' and 'Save' buttons. The form fields include:

- Salutation\*: Select (dropdown)
- ID Type: Military ID (dropdown)
- DOB\*: ANB\*
- Gender\*: Male (radio button selected)
- Contact No.\*: Select + (dropdown)
- Occupation: Search icon (dropdown)
- Estimated Annual Income: Text input
- Customer's Name\*: Text input (marked with a red circle labeled '1')
- ID No.: Text input (marked with a red circle labeled '1')
- Marital Status: Select (dropdown)
- Alternative Contact No.: Select + (dropdown)
- Occupation Class: Text input
- Smoking Habit: Text input

Description	
1	[ID NO] Text input: • If ID Type is not NRIC, show free text input with 15 character length.
2	[Save] Button: • Save entered client's information.
3	[Back] Button: • Go back "Search Client" page

### 3. Client Data Management

#### 3.2 Create/Edit Client - Search Occupation Popup



Description	
*	Search result is Filtered by Occupation & Category.

### 3. Client Data Management

#### 3.3 Profiles History

Scalable

Profile Name	Updated Date	Recommended Product	CFFF	FNA	SIS
New Profile	20-11-2014	1. Secure Wealth	Completed	N/A	SIS #1
Presentation	20-11-2014	1. AmMetLife Protect 99	Pending_Signature	FNA #1	SIS #1
For his son	19-11-2014		N/A	N/A	N/A

Back      Customer Fact Find      Financial Needs Analysis      Sales Illustration

Description	
1	<ul style="list-style-type: none"> <li>Selected customer name is displayed</li> </ul>
2	<ul style="list-style-type: none"> <li>[Create New Profile] Button:           <ul style="list-style-type: none"> <li>Show Create New Profile Popup</li> <li>New profile is displayed in the list after created</li> </ul> </li> </ul>
3	<ul style="list-style-type: none"> <li>[Rename Profile] Button:           <ul style="list-style-type: none"> <li>Show Rename Profile Popup</li> <li>Default: disabled</li> <li>if select profile, it is enabled.</li> </ul> </li> </ul>
4	<ul style="list-style-type: none"> <li>[Delete] Button:           <ul style="list-style-type: none"> <li>Default: disabled</li> <li>if select profile, it is enabled.</li> </ul> </li> </ul>
5	<ul style="list-style-type: none"> <li>[Recommended Product] Column:           <ul style="list-style-type: none"> <li>display SIS product name</li> </ul> </li> </ul>
6	<ul style="list-style-type: none"> <li>CFFF Status:           <ul style="list-style-type: none"> <li>N/A, Incomplete, Pending Signature, Completed.</li> </ul> </li> </ul>
7	<ul style="list-style-type: none"> <li>FNA Status:           <ul style="list-style-type: none"> <li>N/A, FNA #1, FNA #2, FNA #3</li> <li>Max 3 FNA can be generated.</li> </ul> </li> </ul>
8	<ul style="list-style-type: none"> <li>FNA Status:           <ul style="list-style-type: none"> <li>N/A, SIS #1, SIS #2, SIS #3</li> <li>Max 3 SIS can be generated.</li> </ul> </li> </ul>

### 3. Client Data Management

#### 3.3 Profiles History - Create New Profile Popup

The screenshot shows the MetLife Client Data Management app interface on an iPad. The top status bar indicates the device is an iPad with signal, battery level at 50%, and time 10:24 AM. The navigation bar shows 'Client Data Management' and 'Profiles History'. A message 'USER NAME has 3 Profiles' is displayed. Below is a table of profiles:

Profile Name	Updated Date	Recommended Product	CFFF	FNA	SIS
New Profile	20-11-2014	1. Secure Wealth	Completed	N/A	SIS #1
Presentation	20-11-2014	1. ArmMetLife Protect 99	Pending_Signature	FNA #1	SIS #1
For his son	19-11-2014		N/A	N/A	N/A

A modal window titled 'Create New Profile' is open in the foreground. It contains a 'Profile Name' input field and a 'Create' button. A red circle with the number '1' is overlaid on the 'Create' button, indicating it is the primary action item.

At the bottom of the screen, there are navigation buttons: 'Back', 'Customer Fact Find', 'Financial Needs Analysis', and 'Sales Illustration'.

#### Description

- 1 [Create] Button:  
• Create new profile.

### 3. Client Data Management

#### 3.3 Profiles History - Rename Profile Popup

The screenshot shows the MetLife Client Data Management app interface on an iPad. The top status bar indicates the device is an iPad with cellular signal, the time is 10:29 AM, and the battery is not charging. The main header reads "Client Data Management > Profiles History". A message at the top states "USER NAME has 3 Profiles". Below this is a table with three rows of profile data:

Profile Name	Updated Date	Recommended Product	CFFF	FNA	SIS
New Profile	20-11-2014	1. Secure Wealth	Completed	N/A	SIS #1
Presentation	20-11-2014	1. AmMetLife Protect 99	Pending_Signature	FNA #1	SIS #1

A "Rename Profile" button is visible in the top right of the main screen. A modal dialog box titled "Rename Profile" is displayed in the center. It contains a "Profile Name" input field and a "Confirm" button. A red circle with the number "1" is overlaid on the "Confirm" button, indicating it is the primary action to be performed.

At the bottom of the screen, there are navigation buttons: "Back", "Customer Fact Find", "Financial Needs Analysis", and "Sales Illustration".

#### Description

- 1 [Confirm] Button:  
• Rename profile.

### 3. Client Data Management

#### 3.3 Profiles History

iPad 10:29 AM Not Charging

Client Data Management Profiles History English

USER NAME has 3 Profiles Create New Profile Rename Profile Delete

Profile Name	Updated Date	Recommended Product	CFFF	FNA	SIS
New Profile	20-11-2014	1. Secure Wealth	Completed	N/A	SIS #1
Presentation	20-11-2014	1. AmMetLife Protect 99	Pending_Signature	FNA #1	SIS #1
For his son	19-11-2014		N/A	N/A	N/A

4 1 2 3

Description	
1	[Customer Fact Find] Button: • If CFFF is N/A, go to create CFFF screen • In case CFFF status is Incomplete, Pending Signature, go to edit screen • In case CFFF status is complete, user can view CFFF, SIS and FNA linked to the profile but can not modify.
2	[Financial Analysis] Button: • If FNA is N/A, go to create FNA screen • In case more than 1 FNA is linked, display popup list
3	[Sales Illustration] Button: • If SIS is N/A, go to create SIS screen • In case more than 1 SIS is linked, display popup list
4	[Back] Button: • Go back "Search Client" page

### 3. Client Data Management

#### 3.3 Profiles History - FNA List Popup (CFFF is incomplete)

The screenshot shows the Client Data Management app interface on an iPad. The top bar displays 'iPad' with signal strength, '10:29 AM', and battery status. The main header 'Client Data Management' is followed by 'Profiles History'. The sub-header 'USER NAME has 3 Profiles' indicates there are three profiles. Below this is a table with columns: Profile Name, Updated Date, Recommended Product, CFFF, FNA, and SIS. The rows show 'New Profile' (Completed, N/A, SIS #1), 'Presentation' (Pending\_Signature, FNA #1, SIS #1), and 'For his son' (N/A, N/A, N/A). A modal window titled 'FNA List' is open, showing a single row for 'Income Protection' with details: Annual Income : RM 35,000 , Years of Income Provision : 15 Years, Additional Capital Required : RM 163,842, and Creation Date : 20-11-2014. At the bottom of the modal are three buttons: 'Create New' (circled 1), 'Edit' (circled 2), and 'Delete' (circled 3). Navigation buttons at the bottom include 'Back', 'Customer Fact Find', 'Financial Needs Analysis', and 'Sales Illustration'.

Description	
1	[Create New] Button: <ul style="list-style-type: none"><li>If 3 FNA is existing, can not create new one.</li><li>Go to "Financial Needs Analysis" page</li></ul>
2	[Edit] Button: <ul style="list-style-type: none"><li>Default : disabled</li><li>If selected one of list, it is enabled.</li><li>If the FNA is linked to completed CFFF, then this button will be changed to "View" button to disable data modification.</li></ul>
3	[Delete] Button: <ul style="list-style-type: none"><li>Default : disabled</li><li>If selected one of list, it is enabled.</li><li>Delete selected FNA.</li></ul>

### 3. Client Data Management

#### 3.3 Profiles History - FNA List Popup (CFFF is completed)

The screenshot shows the Client Data Management interface on an iPad. The top bar displays the device as an iPad with signal, battery level at 61%, and the time as 11:46. The main header reads "Client Data Management" and "Profiles History". A sub-header indicates "CLIENT has 1 Profile". Below this, there are buttons for "Create New Profile", "Rename Profile", and "Delete". A table lists one profile: "Investment" with "Updated Date" 26-11-2014, "Recommended Product" 1. AmMetLife Link, "CFFF" status "Completed", "FNA" "FNA #1", and "SIS" "SIS #1". A modal window titled "FNA List" is displayed, showing a single row of data: Type "Income Protection", Information "Annual Income : RM 200,000 , Years of Income Provision : 15 Years", Additional Capital Required "RM 300,961", Creation Date "26-11-2014", and a "View" button. A red circle with the number "1" is placed over the "View" button. At the bottom of the screen are buttons for "Back", "Customer Fact Find", "Financial Needs Analysis", and "Sales Illustration".

Description	
1	[View] Button: • Go to "Financial Needs Analysis" page • Can not modify selected FNA

### 3. Client Data Management

#### 3.3 Profiles History - SIS List Popup (CFFF is incomplete)

The screenshot shows the MetLife Client Data Management app interface on an iPad. The top status bar indicates the device is an iPad with cellular connectivity, the time is 10:29 AM, and the battery is not charging. The main navigation bar includes 'Client Data Management' and 'Profiles History'. A message 'USER NAME has 3 Profiles' is displayed. Below this is a table of profiles:

Profile Name	Updated Date	Recommended Product	CFFF	FNA	SIS
New Profile	20-11-2014	1. Secure Wealth	Completed	N/A	SIS #1
Presentation	20-11-2014	1. AmMetLife Protect 99	Pending_Signature	FNA #1	SIS #1
For his son	19-11-2014		N/A	N/A	N/A

An 'SIS List' modal window is overlaid on the screen. It displays a single row of data for an AmMetLife Protect 99 plan. The data is as follows:

Plan Code	Plan Name	Life Assured	ANB	Annual Premium	Sum Assured	Creation Date
PRT99	AmMetLife Protect 99	USER NAME	35	623.50	50,000	20-11-2014

At the bottom of the modal, there are three buttons: 'Create New' (marked with a red circle 1), 'Edit' (marked with a red circle 2), and 'Delete' (marked with a red circle 3).

At the very bottom of the app interface, there are navigation buttons: 'Back', 'Customer Fact Find', 'Financial Needs Analysis', and 'Sales Illustration'.

Description	
1	[Create New] Button: <ul style="list-style-type: none"><li>If 3 SIS is existing, can not create new one.</li><li>Go to "Sales Illustration" page</li></ul>
2	[Edit] Button: <ul style="list-style-type: none"><li>Default : disabled</li><li>If selected one of list, it is enabled.</li><li>If the SIS is linked to completed CFFF, then this button will be changed to "View" button to disable data modification.</li></ul>
3	[Delete] Button: <ul style="list-style-type: none"><li>Default : disabled</li><li>If selected one of list, it is enabled.</li><li>Delete selected SIS.</li></ul>

### 3. Client Data Management

#### 3.3 Profiles History - SIS List Popup (CFFF is completed)

The screenshot shows the Client Data Management application interface on an iPad. At the top, there is a header bar with the text "iPad" and "오전 11:46" (AM 11:46), a battery icon at 61%, and a gear icon. Below the header, the main title "Client Data Management" is followed by a breadcrumb "Profiles History". On the right side of the header are buttons for "English" (with a dropdown arrow), settings, and close.

The main content area displays a message "CLIENT has 1 Profile" with three buttons: "Create New Profile", "Rename Profile", and "Delete". Below this, a table lists one profile:

Profile Name	Updated Date	Recommended Product	CFFF	FNA	SIS
Investment	26-11-2014	1. AmMetLife Link	Completed	FNA #1	SIS #1

A modal window titled "SIS List" is displayed over the main content. It contains a table with the following data:

Plan Code	Plan Name	Life Assured	ANB	Annual Premium	Sum Assured	Creation Date
ULRP6	AmMetLife Link	CLIENT	25	30,000.00	1,100,000	26-11-2014

At the bottom right of the modal, there is a button labeled "View" with a red circle containing the number "1" to its left.

At the very bottom of the screen, there are navigation buttons: "Back", "Customer Fact Find", "Financial Needs Analysis", and "Sales Illustration".

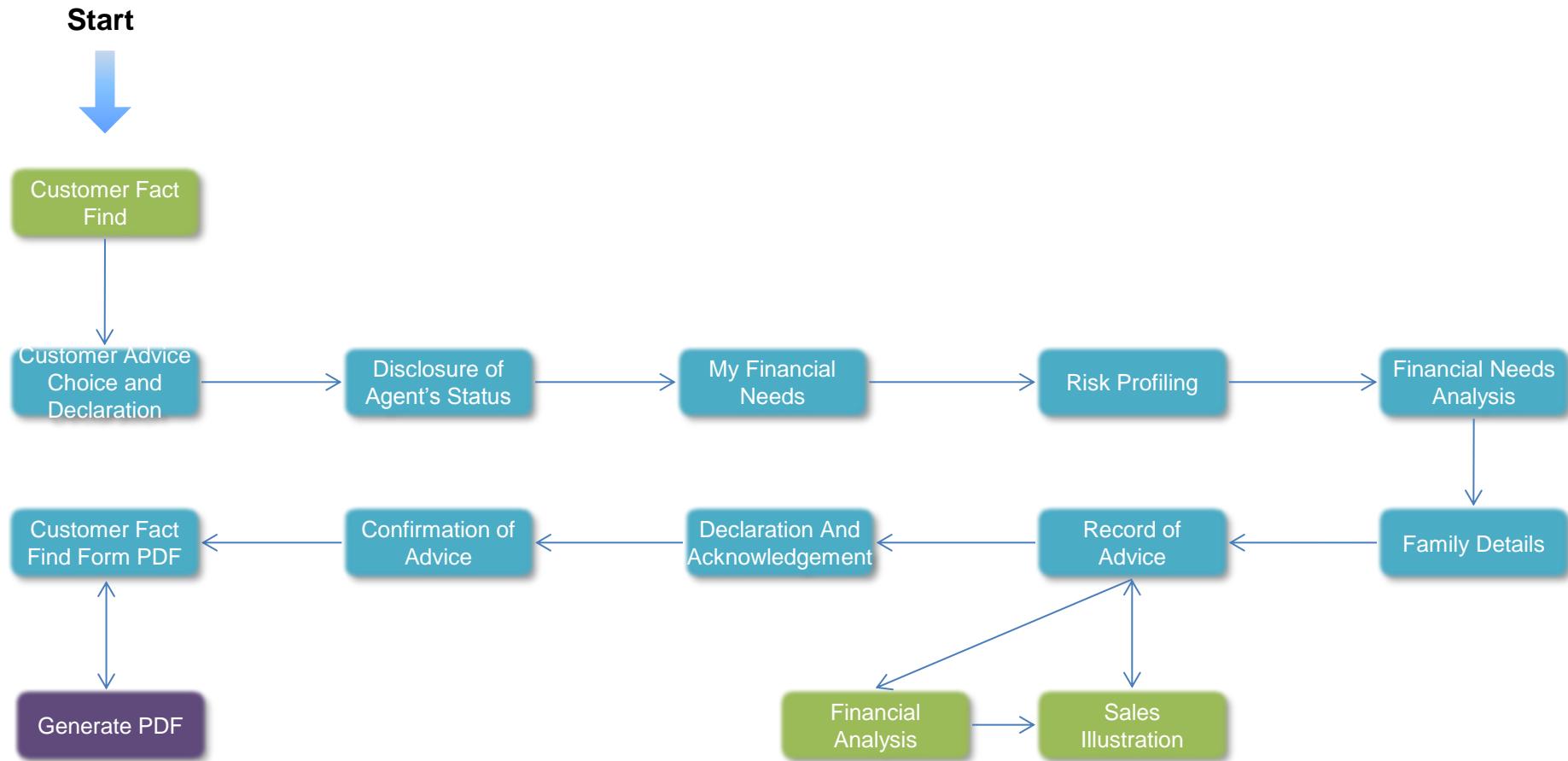
#### Description

- 1 [View] Button:  
• Go to “Sales Illustration” page  
• Can not modify selected SIS

## 4. Customer Fact Find

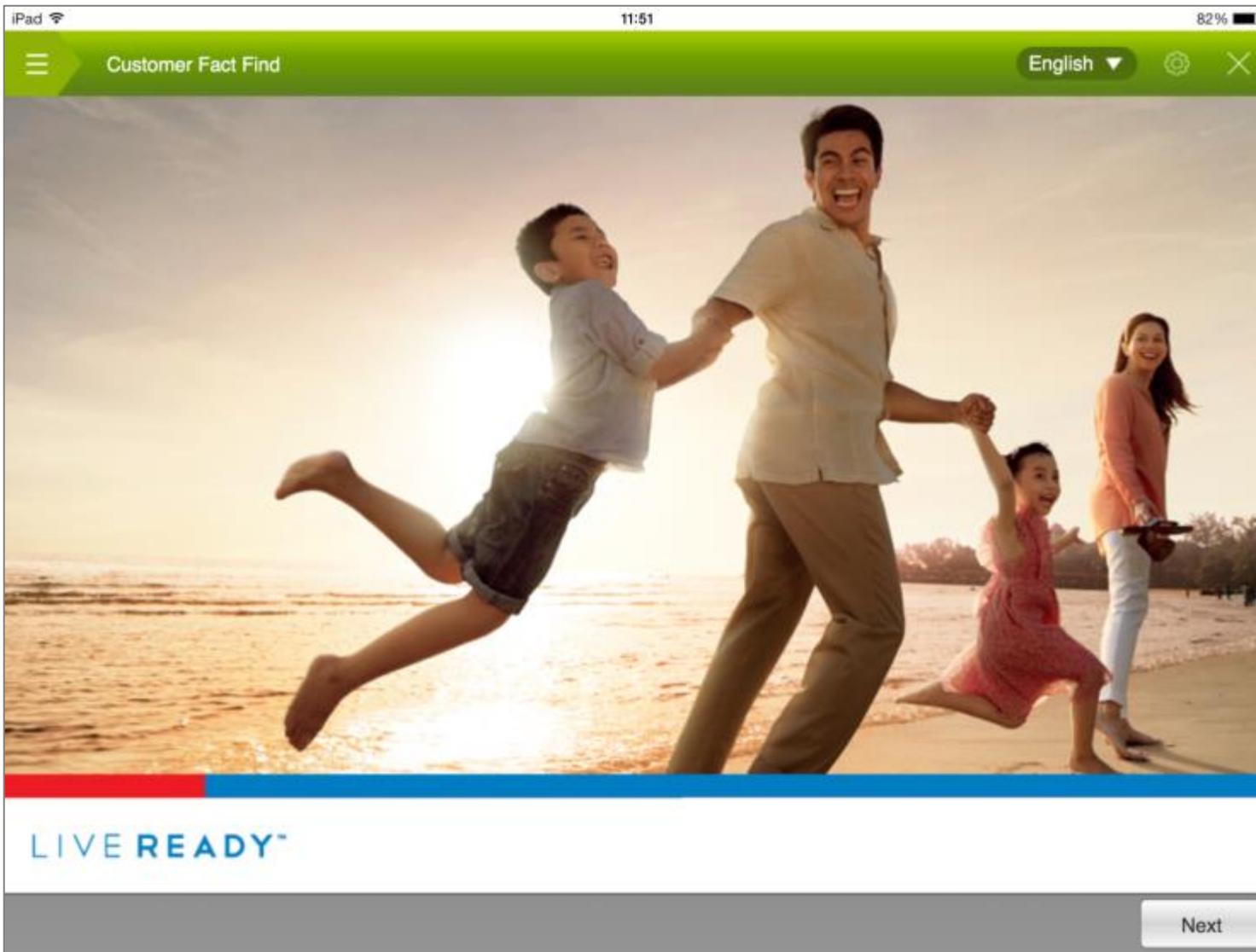
- |   |  |
|---|--|
| 4.1 CFFF landing page                         | 4.8 Record of Advice   |
| 4.2 Customer Advice<br>Choice and Declaration | 4.9 Declaration And<br>Acknowledgement                       |
| 4.3 Disclosure of Agent's<br>Status           | 4.10 Confirmation of<br>Advice                               |
| 4.4 My Financial Needs                        | 4.11 Customer Fact Find<br>Form PDF                          |
| 4.5 Risk Profiling                            | 4.12 Confirmation of<br>Advice – After<br>embedded signature |
| 4.6 Financial Needs<br>Analysis               |  |
| 4.7 Family Details                            |  |

# 4.Customer Fact Find



## 4. Customer Fact Finding

### 4.1 CFFF landing page



#### Description

- |   |  |
|---|--|
| * | When clicked 'Customer Fact Find' button on side menu, display landing image.<br>If coming from other pages (ex. Profiles History, Sales Illustration), not display. |
|---|--|

## 4. Customer Fact Finding

### 4.2 Customer Advice Choice and Declaration

Customer Fact Find      11:51      82%

**Customer Advice Choice and Declaration**

Customer Info      English

Customer Advice Choice and Declaration      Disclosure of Agent's Status      My Financial Needs      Risk Profiling      Financial Needs Analysis

1      2      3      4

Salutation\*      Select      Customer's Name\*

ID Type\*      Select      ID No\*

DOB\*      ANB\*

Gender\*      Male      Female      Marital Status\*

Occupation\*      Select      Occupation Class\*

Estimated Annual Income\*      Contact No.\*

Proposal No.

Customer Advice Choice and Declaration

5      6      7

Option A      I/We wish to disclose all information requested for in this Form.

Option B      I/We wish to disclose partially information requested for in this Form  
(fill in all sections except sections Family Details).

Option C      I/We wish to receive product information only and do not wish to disclose any information requested for in this Form  
(fill in all sections except sections Financial Needs Analysis and Family Details).

Save      Next

Description	
*	Selected Client info is auto populated. If done on CM 1 <sup>st</sup> then only come CFFF, relevant info will auto populated to CFFF, and required agent to fill in the rest of the info.
*	Mandatory field : Salutation, Customer's Name, ID Type, ID No, DOB, ANB, Gender, Marital Status, Occupation, Occupation Class, Estimated Annual Income, Contract No
1	[Tab status] •  : this tab is complete. •  : this tab is filled in. •  : this tab is not filled yet.
2	[Reset] Button: • Reset the selected client info to go back to the status of not selecting the client.
3	[Select Client] Button: • show "Search Client Popup" • Selected client info is auto populated.
4	[ANB] Text input: • if select DOB, ANB is auto calculated.
5	[CFFF Option] Radio Button: • Depending on the option selected, Tab is shown or hide. • If select Option C, show popup message.
6	[Save] Button: • Save CFFF. In case there is profile, new profile is generated. • If not existing customer, ask if agent wants to save. Profile is only saved when the customer is registered in customer DB.
7	[Next Button] : • Move to the "Disclosure of Agent's Status" tab after Validation Check .

## 4. Customer Fact Finding

### 4.2 Customer Advice Choice and Declaration - Clicked Save Button

Customer Fact Find    11:54    81%

Customer Advice Choice and Declaration    English

Customer Advice Choice and Declaration    Disclosure of Agents Status    My Financial Needs    Risk Profiling    Record of Advice

Customer Info    Reset    Select Client

Salutation\*: DATIN

ID Type\*: Police ID

DOB\*: 24-11-1975

Gender\*: Male

Occupation\*: Military Police-0

Estimated Annual Income\*

Proposal No.

Customer's Name\*: MIKE

ID No\*: P237890568

ANB\*: 39

Married

2

Mobile + 78 0987654

Customer Advice Choice and Declaration

Option A: I/We wish to disclose all information requested for in this Form.

Option B: I/We wish to disclose partially information requested for in this Form (fill in all sections except sections Family Details).

Option C: I/We wish to receive product information only and do not wish to disclose any information requested for in this Form (fill in all sections except sections Financial Needs Analysis and Family Details).

Save    Next

#### Description

- |   |   |
|---|---|
| * | • If customer is unregistered, Ask to register customer.                      |
| 1 | • If no, client is not registered and can not save profile, CFFF.             |
| 2 | • If yes, client is registered and make new profile that linked to this CFFF. |

## 4. Customer Fact Finding

### 4.2 Customer Advice Choice and Declaration - Clicked Save Button

The screenshot shows the 'Customer Fact Find' application interface on an iPad. The top navigation bar includes 'Customer Fact Find', 'Customer Advice Choice and Declaration' (which is the active tab), 'English', and other settings. Below the navigation is a toolbar with five icons: 'Customer Advice Choice and Declaration' (selected), 'Disclosure of Agent's Status', 'My Financial Needs', 'Risk Profiling', and 'Record of Advice'. The main form is titled 'Customer Info' and contains fields for Salutation (DATIN), Customer's Name (MIKE), ID Type (Police ID), ID No (P237890568), DOB (24-11-1975), ANB (39), Gender (Male), Occupation (not specified), Estimated Annual Income (78), and Proposal No. (0987654). A modal dialog box titled 'Create New Profile' is overlaid on the form, containing a 'Profile Name' input field and a 'Create' button. The 'Create' button has a red circle with the number 1 above it, indicating it is the next step. At the bottom of the screen are 'Save' and 'Next' buttons.

#### Description

- |   |   |
|---|---|
| * | <ul style="list-style-type: none"><li>Customer has been registered but if profile is not generated yet, or for the case just registered customer, this pop up will be displayed.</li></ul>  |
| 1 | <p>[Create] Button:</p> <ul style="list-style-type: none"><li>Creating the new profile of selected customer at the profile history and, this CFFF will be linked to this profile.</li></ul> |

## 4. Customer Fact Finding

### 4.2 Customer Advice Choice and Declaration

The screenshot shows the 'Customer Fact Find' application interface on an iPad. The top navigation bar includes icons for signal strength, battery level (82%), and time (11:51). The main title 'Customer Fact Find' is followed by 'Customer Advice Choice and Declaration'. A language dropdown shows 'English' with a downward arrow. On the right are settings and close buttons.

The top menu bar has five items: 'Customer Advice Choice and Declaration' (highlighted in green), 'Disclosure of Agent's Status', 'My Financial Needs', 'Risk Profiling', and 'Financial Needs Analysis'. Each item has a red exclamation mark icon above it.

The main content area is divided into sections:

- Customer Info:** Contains fields for Salutation\*, ID Type\*, DOB\*, Gender\*, Occupation\*, Estimated Annual Income\*, and Proposal No. Most fields have red borders indicating they are mandatory.
- Customer Advice Choice and Declaration:** Contains three radio button options:
  - Option A: I/We wish to disclose all information requested for in this Form.
  - Option B: I/We wish to disclose partially information requested for in this Form (fill in all sections except sections Family Details).
  - Option C: I/We wish to receive product information only and do not wish to disclose any information requested for in this Form (fill in all sections except sections Financial Needs Analysis and Family Details).

At the bottom are 'Save' and 'Next' buttons.

#### Description

\* If mandatory field is not filled, that is highlighted as red border.

## 4. Customer Fact Finding

### 4.2 Customer Advice Choice and Declaration (if select option C)

iPad 11:52 82%

Customer Fact Find Customer Advice Choice and Declaration English

Customer Advice Choice and Declaration Disclosure of Agent's Status My Financial Needs Risk Profiling Record of Advice

Customer Info Reset Select Client

Salutation\* Select Customer's Name\*

ID Type\* Select ID No\*

DOB\* ANB\*

Gender\* Occupation\* Estimated Annual Income\* Proposal No.

Customer Advice Choice and Declaration

Option A I/We wish to disclose all information requested for in this Form.

Option B I/We wish to disclose partially information requested for in this Form (fill in all sections except sections Family Details).

Option C I/We wish to receive product information only and do not wish to disclose any information requested for in this Form (fill in all sections except sections Financial Needs Analysis and Family Details).

Save Next

Description	
*	If select option C, display this message.

# 4. Customer Fact Finding

## 4.3 Disclosure of Agent's Status

The screenshot shows the 'Customer Fact Find' app interface on an iPad. At the top, there are icons for signal strength, battery level (81%), and time (11:54). The title 'Customer Fact Find' is at the top left, and 'Disclosure of Agent's Status' is the active tab at the top center. A green bar at the top has five tabs: 'Customer Advice Choice and Declaration' (green), 'Disclosure of Agent's Status' (orange warning icon), 'My Financial Needs' (red exclamation mark), 'Risk Profiling' (red exclamation mark), and 'Financial Needs Analysis' (red exclamation mark). Below the tabs, the agent's name 'LEONG WEI KUON' (1) and agent code 'AG1001083' (2) are displayed. A large text area states: 'I am a life insurance agent who represents AmMetLife Insurance Berhad (AmMetLife) and can advise you on our full range of:'. A red box labeled '3' highlights a list of insurance product types with checkboxes. The checked items are: 'Term Insurance Products', 'Endowment Insurance Products', 'Whole Life Insurance Products', and 'Medical, Accident and Health Insurance Products'. The 'Investment-Linked Insurance Products' checkbox is unchecked. A red box labeled '4' is at the bottom left, and a red box labeled '5' is at the bottom right. The bottom section contains an 'IMPORTANT NOTICE TO CUSTOMER' and two bullet points about agent responsibility and information provision.

1 [Agent's Name] Text input:  
• Personal Info is auto-populated and can be edited.

2 [Agent's Code] Text input:  
• Personal Info is auto-populated and can be edited.

3 Features that Agent can advise.  
• Term, Endowment, Whole Life, Medical are selected as a Default. Only for the ILP Products, these features could be checked or unchecked.  
• If selected Profile is ILP product that linked with SIS, then this ILP Product will be automatically checked for these part, and could not be unchecked.

4 [Back] Button:  
• Go back "Customer Advice Choice and Declaration" tab

5 [Next] Button:  
• Go to "My Financial Needs" tab

3

1 LEONG WEI KUON

2 AG1001083

I am a life insurance agent who represents AmMetLife Insurance Berhad (AmMetLife) and can advise you on our full range of:

3

Term Insurance Products

Endowment Insurance Products

Whole Life Insurance Products

Medical, Accident and Health Insurance Products

Investment-Linked Insurance Products

4

5

IMPORTANT NOTICE TO CUSTOMER (Please read this carefully before proceeding with your Customer Fact Find Form CFFF)

- \* Your agent must have sufficient information before making a suitable recommendation. The information that you provide will be the basis on which advice is given.
- \* If you choose not to provide all the relevant information requested, your agent may not be able to provide you with suitable advice and as a result, you may risk making a financial commitment to a life insurance policy inappropriate to your needs.

4 Back

Save

5 Next

## 4. Customer Fact Finding

### 4.4 My Financial Needs

Customer Fact Find > My Financial Needs

My financial needs	Already planned	To discuss	Priority (1=LOW; 5=HIGH)	Remarks*
I need to protect myself and my family against the financial impact of death, disability and critical illness.	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	1 <span style="border: 1px solid red; border-radius: 50%; padding: 2px;">1</span>	already planned <span style="border: 1px solid red; border-radius: 50%; padding: 2px;">2</span> <span style="border: 1px solid red; border-radius: 50%; padding: 2px;">3</span>
I am looking for security during retirement.	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	3	Select <span style="border: 1px solid red; border-radius: 50%; padding: 2px;">4</span>
I want to make provision for my children's education.	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	2	Select <span style="border: 1px solid red; border-radius: 50%; padding: 2px;">5</span>
I am saving for a specific need.	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	5	Select <span style="border: 1px solid red; border-radius: 50%; padding: 2px;">6</span>
I want to make lump-sum investment.	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	4	review in future <span style="border: 1px solid red; border-radius: 50%; padding: 2px;">7</span>

\*Indicate under remark column , area not to be discussed and why, e.g.:“already planned”, “review in future”, “not important now” etc.

4 Back 5 Next 6 Save

Description	
*	Enter My Financial Needs information.
1	[Priority] Dropdown: • 1, 2, 3, 4, 5 • No duplicate selection is allowed
2	[Remarks] Dropdown: • already planned , review in future, not important now , others
3	[Others] Text Input: • Default : disabled • If Remarks select others, this is enabled. • If select To discuss is Yes, Remarks dropdown is disabled. • If Remarks select already planned, Already planned radio is Yes.
4	[Back] Button: • Go back “Disclosure of Agent’s Status” tab
5	[Next] Button: • Go to “Risk Profiling” tab

## 4. Customer Fact Finding

### 4.5 Risk Profiling

The screenshot shows the 'Risk Profiling' tab of the 'Customer Fact Find' section. At the top, there are tabs for 'Customer Advice Choice and Declaration', 'Disclosure of Agent's Status', 'My Financial Needs', 'Risk Profiling' (which is selected), and 'Financial Needs Analysis'. Below the tabs is a table for risk profiling.

Statement	Option	Score
I'm prepared to invest for	Only a year or two	1 2
	Up to 5 years	3 4
	More than 10 years	5
I can accept	Very low risk and know that my capital is safe	1 2
	Some fluctuations in value	3 4
	A higher risk for the chance of a higher return	5
My investment tolerance is	No decline in the value of my investment	1 2
	I am moderately concerned about short term declines in value	3 4
	I accept that my investment values may go down in the short/medium term	5

**Total score : 14** 2

Based on my total score, my preference is **Medium appetite** 3

4 Back 5 Next

#### Description

- Select each score, those fields are auto filled in.
- [Total score]
  - If select score, will be auto calculated.
- [Appetite]
  - Display appetite based on total score.
- [Back] Button :
  - Go back "My Financial Needs" tab.
- [Next] Button :
  - If this CFFF is filled in after SIS is done, Check matching client's risk appetite and the funds allocation.
  - If not matching. Display Appetite Matching Error popup.
  - If matching. Go to "Financial Needs Analysis" tab.

## 4. Customer Fact Finding

### 4.5 Risk Profiling - alert

The screenshot shows the 'Risk Profiling' section of the 'Customer Fact Find' app. At the top, there are five tabs: 'Customer Advice Choice and Declaration' (green checkmark), 'Disclosure of Agent's Status' (green checkmark), 'My Financial Needs' (green checkmark), 'Risk Profiling' (green checkmark), and 'Financial Needs Analysis' (green checkmark). The 'Risk Profiling' tab is active.

Statement	Option	Score
I'm prepared to invest for	Only a year or two	1 2
	Up to 5 years	3 4
	More than 10 years	5
I can accept	Very low risk and know that	1 2
	Some fluctuations in value	3 4
	A higher risk for the chance of a higher return	5
My investment tolerance is	No decline in the value of my investment	1 2
	I am moderately concerned about short term declines in value	3 4
	I accept that my investment values may go down in the short/medium term	5

**Total score : 11**

Based on my total score, my preference is **Medium appetite**

Buttons at the bottom: Back, Save, Next.

#### Description

\* If risk appetite is not matching, this message is show up.

## 4. Customer Fact Finding

### 4.5 Risk Profiling - Appetite Matching Error

**Risk Profiling - Appetite Matching Error**

**Statement**

Statement	Option	Score
Only a year or two	<input type="radio"/> 1 <input type="radio"/> 2 <input checked="" type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5	
I'm prepared to invest for	<input type="radio"/> Up to 5 years <input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5	
I can accept	<input type="radio"/> No decline in the value of my investment <input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5	
My investment tolerance is	<input type="radio"/> I am moderately concerned about short term declines in value <input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5	
Total score : 11	Based on my total score, my preference is <b>Medium appetite</b>	

**Back** **Save** **Next**

Description	
*	You can choose one of three options.
1	• You select risk profile again.
2	• Select this option, go to Sales Illustration Page to create new one.
3	• Select this option, you should fill in Actions taken by customer if different from recommendations in Record of Advice tab.

# 4. Customer Fact Finding

## 4.6 Financial Needs Analysis (1/2)

The screenshot shows the 'Customer Fact Find' application interface on an iPad. The top navigation bar displays 'Customer Fact Find' and 'Financial Needs Analysis'. Below the navigation are five green status indicators: 'Customer Advice Choice and Declaration' (green checkmark), 'Disclosure of Agent's Status' (green checkmark), 'My Financial Needs' (green checkmark), 'Risk Profiling' (green checkmark), and 'Financial Needs Analysis' (orange exclamation mark). The main content area starts with a 'Number of Existing Policy(s)' input field containing '1', which is circled in red. Below it are four tabs: 'Policy #1' (selected), 'Policy #2', 'Policy #3', and 'Policy #4'. The form then lists various policy details: 'Policy Owner' (empty), 'Life Assured\*' (empty), 'Company' (empty), 'Type of Plan' (dropdown menu labeled 'Select', circled in red), 'Death Benefits\*' (empty), 'Disability Benefits' (empty), 'Critical Illness Benefits' (empty), 'Other Benefits / (H&S, Accidental, etc.)' (empty), 'Annual Premium\*' (empty), 'Premium Type\*' (dropdown menu labeled 'Select'), 'Frequency' (dropdown menu labeled 'Select'), 'Start Date / Policy Effective Date' (empty), 'Maturity Date' (empty), 'Projected Lump Sum at Maturity(RM)' (empty), and 'Affordability(%)' (empty, circled in red). At the bottom, a question asks, 'How much of your current income would you like to allocate for protection/retirement/education/savings/investment per month?'. Below this is a table with columns for 'Protection', 'Retirement', 'Education', 'Savings', and 'Investment'. The bottom navigation bar includes 'Back', 'Save', and 'Next' buttons.

Description	
*	Max 4 existing plan information can be entered.
*	Mandatory field : Life Assured, Death Benefits, Annual Premium, Premium Type
1	[Number of Existing Plans] Dropdown • 0, 1, 2, 3, 4 (max up to 4 policies) • Default : 0
2	[Type of plan] Dropdown: • Whole Life Non Par, Whole Life Par, Endowment Savings, Investment-Linked, Term Plan, Universal Life, Fixed Benefit
3	[Affordability] Text input: • Disabled • Be auto calculated. (Annual Income / Annual Premium)

## 4. Customer Fact Finding

### 4.6 Financial Needs Analysis (2/2)

Customer Fact Find      Financial Needs Analysis      English     

Customer Advice Choice and Declaration     Disclosure of Agent's Status     My Financial Needs     Risk Profiling     Financial Needs Analysis

Company	Type of Plan	Select
Death Benefits*	Disability Benefits	
Critical Illness Benefits	Other Benefits / (H&S, Accidental, etc.)	
Annual Premium*	Premium Type*	Select
Frequency	Start Date / Policy Effective Date	
Maturity Date	Projected Lump Sum at Maturity(RM)	
Affordability(%)		

How much of your current income would you like to allocate for protection/retirement/education/savings/investment per month?

Protection	Retirement	Education	Savings	Investment
RM <input type="text" value="0"/>	RM <input type="text" value="0"/>	RM <input type="text" value="0"/> 1	RM <input type="text" value="0"/>	RM <input type="text" value="0"/>

Do you have other income during retirement (such as pension, annuity etc.)?  Yes  No

Yes, please specify? 2

3 Back      Save 4 Next

#### Description

- [Do you have other income during retirement (such as pension, annuity etc.)?  
] Radio:  
• Default : No
- Text Input :  
• Do you have other income during retirement (such as pension, annuity etc.)? is Yes, this field is enabled.
- [Back] Button :  
• Go back “Risk Profiling” tab.
- [Next] Button :  
• After check validation, Go to “Family Details” tab

## 4. Customer Fact Finding

### 4.7 Family Details

The screenshot shows the 'Customer Fact Find' application interface on an iPad. The top navigation bar includes 'Customer Fact Find', 'Family Details' (selected), 'Record of Advice', 'Declaration and Acknowledgement', and 'Confirmation of Advice'. The main content area is titled 'Family Details' and contains fields for 'Number of Family Member' (set to 1, highlighted with a red circle 1), 'Family Member #1' (highlighted with a red circle 2), 'Name\*', 'Relationship\*', 'Gender\*', 'Occupation', 'Date of Birth', and 'Contact No.' (with a 'Home' dropdown). At the bottom are 'Back', 'Save', and 'Next' buttons, with 'Next' highlighted with a red circle 4.

Description	
*	Max 10 family information can be entered.
*	Mandatory field : Name, Relationship, Gender
1	[Number of Family] Dropdown: <ul style="list-style-type: none"><li>Default: 0</li><li>0, 1, 2, 3, 4, 5, 6, 7, 8, 9, 10</li></ul>
2	[Family] Tabs: <ul style="list-style-type: none"><li>User can scroll to enter more families</li></ul>
3	[Back] Button : <ul style="list-style-type: none"><li>Go back "Financial Needs Analysis" tab.</li></ul>
4	[Next] Button : <ul style="list-style-type: none"><li>After check validation, Go to "Record of Advice" tab</li></ul>

## 4. Customer Fact Finding

### 4.8 Record of Advice (1/2)

Number of Recommendation : 1 1

Type of Plan  

Sum Covered(RM)  

Name of Policy Owner  

Frequency Select

Bought 3  Yes  No

Reason for recommending Select 4

Actions taken by customer if different from recommendations 5

6 Back 7 Financial Needs Analysis 8 Sales Illustration 9 Next

Description	
*	Max 3 Recommendation can be entered.
1	[Number of Recommendation] • 1/2/3
2	Completed SIS info is auto populated.
3	[Bought] Radio Box: • Default: Yes
4	[Reason for recommending] Dropdown: • Protection, Supplement retirement income, Child education, Saving for specific need, Lump Sum investment, Others • If select others, show free text input.
5	[Actions taken by customer if different from recommendations] Text Input: • If risk appetite is not match, this field must be filled in.
6	[Back] Button: • Go back ‘Family Details’ tab
7	[Financial Analysis] Button: • Go to ‘Financial Needs Analysis’ page
8	[Sales Illustration] Button: • Go to ‘Sales Illustration’ page • When back to this page, SIS info is auto populated in Recommendation fields. • In case no illustration is linked, go to create new illustration screen. • In case illustration is linked, display popup list.
9	[Next] Button: • Before go to next page, check on reason for recommending and top priority. • If reason for recommending and top priority not tally. Replace it by pop out message “Do you want to proceed with current recommendation? If yes please put in remark.”

## 4. Customer Fact Finding

### 4.8 Record of Advice (2/2)

iPad 11:58 80%

Customer Fact Find > Record of Advice English

Needs Analysis (Green Checkmark) Family Details (Green Checkmark) Record of Advice (Red Exclamation) Declaration and Acknowledgement (Red Exclamation) Confirmation of Advice (Red Exclamation)

Number of Recommendation : 1

Recommendation #1 Recommandation #2 Recommandation #3

Type of Plan Term

Sum Covered(RM)

Name of Policy Owner Premium(RM)

Frequency Select Bought Yes No

Reason for recommending Others

Others 1

Actions taken by customer if different from recommendations

Back Financial Needs Analysis Sales Illustration Save Next

#### Description

- |   |   |
|---|---|
| 1 | If Reason for recommending select Others, this fields is shown. |
|---|---|

## 4. Customer Fact Finding

### 4.8 Record of Advice - SIS List Popup

The screenshot shows the 'Record of Advice' screen of the MetLife Malaysia MOS application. At the top, there are tabs: 'Financial Needs Analysis' (green checkmark), 'Family Details' (green checkmark), 'Record of Advice' (orange warning icon), 'Declaration and Acknowledgement' (green checkmark), and 'Confirmation of Advice' (green checkmark). Below these tabs, it says 'Number of Recommendation : 2'. Underneath, there are three buttons labeled 'Recommendation #1', 'Recommendation #2', and 'Recommendation #3'. Further down, there are fields for 'Type of Plan' (AmLife SecureCare) and 'Term' (55). A modal window titled 'SIS List Popup' is displayed, listing two plans:

No.	Plan Code	Plan Name	Life Assured	ANB	Annual Premium	Sum Assured	Creation Date
1	ALSC	AmMetLife SecureCare	CLIENT	25	230.50	50,000	26-11-2014
2	ULLA5	AmMetLife Lifestyle	CLIENT	25	10,000.00	500,000	26-11-2014

At the bottom of the modal, there are buttons for 'Up' (2), 'Down' (3), 'Create New' (4), 'Edit' (5), and 'Delete' (6). The background of the main screen shows a navigation bar with 'Back', 'Financial Needs Analysis', 'Sales Illustration', 'Save', and 'Next' buttons.

Description	
1	[SIS List] • Maximum count is 3. • If risk appetite is not matching with fund allocation, SIS is red color.
2	[Up] Button: • Move SI up for exchanging number.
3	[Down] Button: • Move SI down.
4	[Create New] Button: • Go to “Sales Illustration” page. • If profile linked 3 SIS, this button is hide.
5	[Edit] Button: • Edit selected SIS.
6	[Delete] Button: • Delete selected SIS.

## 4. Customer Fact Finding

### 4.8 Record of Advice - Validation check, if appetite is not matching.

iPad 12:00 80% Customer Fact Find Record of Advice English X

Needs Analysis ✓ Family Details ✓ Record of Advice ! Declaration and Acknowledgement ✓ Confirmation of Advice ✓

Number of Recommendation : 6

Recommendation #1 Recommendation #2 Recommendation #3

Type of Plan AmCapital Term 55

Sum Covered(RM) 5,000 Additional Coverage

Name of Policy Owner YTF

Frequency Yearly

Reason for recommending Child Education

The fund you choose does not match with your risk appetite. Please provide your reason in 'Actions taken by customer'.

Ok

Actions taken by customer if different from recommendations

Back Financial Needs Analysis Sales Illustration Save Next

#### Description

- |   |  |
|---|--|
| * | If risk appetite is not matching with fund allocation, check validation for 'Actions taken by customer if different from recommendations' field. It must be filled in. |
|---|--|

## 4. Customer Fact Finding

### 4.9 Declaration And Acknowledgement

iPad 12:46 68%

Customer Fact Find Declaration and Acknowledgement English

eds Risk Profiling Financial Needs Analysis Family Details Record of Advice Declaration and Acknowledgement

Customer

1 I/We acknowledge that the agent has explained the purpose of this Customer Fact Find Form to me/us and I/we have provided information to the best of my/our understanding and knowledge.

1 I/We acknowledge that a copy of this completed Customer Fact Find Form and the 'Confirmation of Advice' will be sent to me together with the life policy insurance contract.

Name of Customer : BRIAN Date : 20/11/2014

Agent

I declare that I will treat the information provided to me in the Customer Fact Find Form with STRICT CONFIDENTIALITY and I will use it only for the purpose of fact finding in the process of recommending suitable insurance products and shall not use it for any other purposes.

The above analysis/advice is based on the facts furnished in the Form. I have taken reasonable steps to ensure that the advice is suitable for the client, having regard to the facts disclosed and other relevant facts which are made available to me.

I have also explained to the client about the features of the product recommended and have given sufficient information to enable the client to make an informed decision.

For leader/supervisor: I declare that I have reviewed this Customer Fact Find Form and to my best belief and knowledge, the advice and recommendation given by the intermediary is sound and appropriate (applicable for agent who has been contracted for one (1) year and below).

Name of Agent : KOK MAN WAH Date : 20/11/2014

Back Save Next

Description	
1	Customer must check both box.
2	[Back] Button : <ul style="list-style-type: none"><li>Go back "Record of Advice" tab.</li></ul>
3	[Next] Button : <ul style="list-style-type: none"><li>After check validation, Go to "Confirmation of Advice" tab</li></ul>

## 4. Customer Fact Finding

### 4.9 Declaration And Acknowledgement

The screenshot shows a mobile application interface for 'Customer Fact Find' on an iPad. The top bar includes icons for signal, battery level (68%), and time (12:46). The main title is 'Declaration and Acknowledgement'. Below it, a navigation bar shows steps: 'eds' (with a checkmark), 'Risk Profiling' (with a checkmark), 'Financial Needs Analysis' (with a checkmark), 'Family Details' (with a checkmark), 'Record of Advice' (with a checkmark), and 'Declaration and Acknowledgement' (highlighted in green).

The declaration text reads: 'I declare that I will treat the information provided to me in the Customer Fact Find Form with STRICT CONFIDENTIALITY and I will use it only for the purpose of fact finding in the process of recommending suitable insurance products and shall not use it for any other purposes.'

The advice statement is: 'The above analysis/advice is based on the facts furnished in the Form. I have taken reasonable steps to ensure that the advice is suitable for the client, having regard to the facts disclosed and other relevant facts which are made available to me.'

The explanatory statement is: 'I have also explained to the client about the features of the product recommended and have given sufficient information to enable the client to make an informed decision.'

For leader/supervisor: 'I declare that I have reviewed this Customer Fact Find Form and to my best belief and knowledge, the advice and recommendation given by the intermediary is sound and appropriate (applicable for agent who has been contracted for one (1) year and below)'.

1 Name of Agent : KOK MAN WAH Date : 20/11/2014

2 Name of Leader :

3 Agent's status

One(1) Years and below  Above one(1) Years

Back Save Next

Description	
1	[Name of Agent]: • Agent Name auto populated from agent's status tab
2	[Name of Leader] Text Input: • If agent's status is One Years and below, it is shown.
3	[Agent's status] Radio box: • If select One(1) Years and below, display Name of Agent. • If select Above one(1) Years, hide Name of Agent.

## 4. Customer Fact Finding

### 4.10 Confirmation of Advice

Customer Fact Find      Confirmation of Advice      English      X

Customer's Name: BRIAN      Proposal No.: 2

Based on the information provided in the Customer Fact Find Form, I have concluded that the customer's prioritised financial goals are as follows :

1	Protecting yourself and your family against the financial impact due to death, disability and critical illness.
2	Planning for security during retirement.
3	Making provision for your children's education.
4	Saving for a specific need.
5	Making a lump-sum investment.

In order to meet these goals, I have recommended the above customer to purchase the following life insurance products :

Life Assured	Product Type	Term	Premium	Frequency	Sum Assured (RM)	Additional Coverage	Bought?
BRIAN	AmMetLife SecureBuilder	15	14,148.60	Yearly	60,000		Y
BRIAN	AmMetLife Medic Flexi	48	274.00	Yearly	-		Y

Back      Save      Generate PDF 5

#### Description

- 1 [Customer's Name] Text Input:  
• Disabled.  
• Value is auto populated from Customer Advice Choice and Declaration tab.
- 2 [Proposal No] Text Input:  
Proposal number allow to input.  
1. Either auto populated from customer advice choice  
2. Or input in confirmation of advice then auto populated to customer advice chose  
3. Or leave it empty until agent print out and manually write the proposal no.
- 3 Shows recommendation product.
- 4 [Back] Button :  
• Go back "Record of Advice" tab.
- 5 [Generate PDF] Button:  
• To generate PDF, should save CFFF info.  
• If signature is done, this is hide.

## 4. Customer Fact Finding

### 4.10 Confirmation of Advice - PDF Language Option Popup

iPad 12:40 70%

Customer Fact Find Confirmation of Advice English ⚙ X

Financial Needs Analysis ✓ Family Details ✓ Record of Advice ✓ Declaration and Acknowledgement ✓ Confirmation of Advice ✓

Customer's Name CFFFFPDFTEST Proposal No.

Based on the information provided in the Customer Fact Find Form, I have concluded that the customer's prioritised financial goals are as follows :

1	Protecting yourself and your family against the financial impact due to death, disability and critical illness.
2	Planning for security during retirement.
3	Making provision for your children's education.
4	Saving for a specific need.
5	Making a lump-sum investment.

PDF Language Option X

<input checked="" type="checkbox"/>	English / Chinese
<input type="checkbox"/>	English / BM

Generate

In order to meet these goals, I have recommended the following life insurance products :

Life Assured	Product Type	Term	Premium	Frequency	Sum Assured (RM)	Additional Coverage	Bought?
CFFFFPDFTEST	AmMetLife Protect 99	66	1,010.00	Yearly	100,000		Y

Notes :

You may cancel your life insurance policy by returning the policy document to AmMetLife Insurance Berhad within fifteen (15) calendar days after you receive it. The statement should be attached with the insurance policy contract and a copy will be kept by AmMetLife Insurance Berhad and the agent.

Back Save Generate PDF

#### Description

\* Two language option.

## 4. Customer Fact Finding

### 4.11 Customer Fact Find Form PDF - Signature page

iPad 19:09 100%

Back

Customer's signature Agent's signature **1 Leader's signature**

Submit Print Open In...

AmMetLife Insurance Berhad (15743-P)  
(Formerly known as AmLife Insurance Berhad) Licensed Insurer  
Level 19, Menara AmMetLife, No. 1, Jalan Lumut, 50400 Kuala Lumpur  
1300 88 8800 +603 2171 3000 customercare@ammelife.com  
Type AML<space>message send to 33911 ammetlife.com

**AmMetLife**

**CUSTOMER FACT FIND FORM / 客户资料表**

Customer's Name / 客户姓名	CLIENT		
Proposal No. / 建议书编号			Contact No. / 联络号码 010-173 558 3321
Gender / 性别	<input checked="" type="checkbox"/> Male / 男	<input type="checkbox"/> Female / 女	Date of Birth/Age / 出生日期 / 年龄 04-12-1989 / 25
Marital Status / 婚姻状况	<input checked="" type="checkbox"/> Single / 单身	<input type="checkbox"/> Married / 已婚	<input type="checkbox"/> Widowed / 丧偶 <input type="checkbox"/> Divorced/Separated / 离婚
NRIC Number / 身份证号码	client001	Estimated Annual Income (Optional) / 预计年收入(可选) (RM)	200,000
Occupation / 职业	Teacher (In School Or College)		
<b>Section 1 / 第一部份 : Disclosure of Agent's Status / 代理员确认与身份声明</b>			
Agent's Name / 代理员姓名	ppp		

#### Description

*	After sending the signatures, embedded signature PDF is generated.
1	[Leader's signature]: • If Agent's status is One(1) Years and below in "Declaration And Acknowledgement" tab, this is show.

## 4. Customer Fact Finding

### 4.11 Customer Fact Find Form PDF - Embedded signature

iPad 12:44 69% 

Back cfff\_sign\_ENMY.pdf Print Open In...

AmMetLife Insurance Berhad (15743-P)  
(Formerly known as AmLife Insurance Berhad) Licensed Insurer  
Level 19, Menara AmMetLife, No. 1, Jalan Lumut, 50400 Kuala Lumpur  
1300 88 8800 +603 2171 3000 customercare@ammetlife.com  
Type AML<space>message send to 33911 ammetlife.com

**CUSTOMER FACT FIND FORM / Borang Pencarian Fakta Pelanggan**

Customer's Name / Nama Pelanggan	CFFFPDFTEST		
Proposal No. / No. Cadangan			Contact No. / No. Telefon 675-875 785 4875
Gender / Jantina	<input checked="" type="checkbox"/> Male / Lelaki	<input type="checkbox"/> Female / Perempuan	Date of Birth/Age / Tarikh Lahir/Umur 29-10-1982 / 33
Marital Status / Status Perkahwinan	<input checked="" type="checkbox"/> Single / Bujang	<input type="checkbox"/> Married / Berkahwin	<input type="checkbox"/> Widowed / Janda/Duda <input type="checkbox"/> Divorced/Separated / Bercerai/Berpisah
NRIC Number / No. Kad Pengenalan	987364598762457	Estimated Annual Income (Optional) / Anggaran Pendapatan Tahunan (Pilihan) (RM)	0
Occupation / Pekerjaan	Accountant, Actuary, Advocate & Solicitor, Advertising		

**Section/Bahagian 1 : Disclosure of Agent's Status / Pendedahan Status Ejen**

Agent's Name / Nama Ejen	KOK MAN WAH		
Agent's Code / Kod Ejen	AG1001229		
I am a life insurance agent who represents AmMetLife Insurance Berhad (AmMetLife) and can advise you on our full range of: / Saya adalah ejen insurans hayat yang mewakili AmMetLife Insurance Berhad (AmMetLife) dan boleh memberikan khidmat nasihat kepada anda berkenaan pelbagai rangkaian:			
<input checked="" type="checkbox"/> Term Insurance Products / Produk Insurans Bertempoh	<input checked="" type="checkbox"/> Endowment Insurance Products / Produk Insurans Endowmen		
<input checked="" type="checkbox"/> Whole Life Insurance Products / Produk Insurans Hayat Seumur Hidup	<input type="checkbox"/> Investment-Linked Insurance Products / Produk Insurans Berkaitan Pelaburan		
<input checked="" type="checkbox"/> Medical, Accident and Health Insurance Products / Produk Insurans Perubatan, Kemalangan dan Kesihatan			

I receive remuneration from AmMetLife Insurance Berhad for providing advice on and selling of their insurance product(s). / Saya menerima imbuhan dari AmMetLife Insurance Berhad untuk khidmat nasihat/jualan produk insurans mereka.

#### Description

*	Equivalent to the existing project screen. Able to send generated PDF
---	--

## 4. Customer Fact Finding

### 4.12 Confirmation of Advice - After embedded signature

iPad 19:10 100%

Customer Fact Find Confirmation of Advice English

Needs Analysis Family Details Record of Advice Declaration and Acknowledgement Confirmation of Advice

Customer's Name **USER NAME** Proposal No. **test**

Based on the information provided in the Customer Fact Find Form, I have concluded that the customer's prioritised financial goals are as follows :

2	Protecting yourself and your family against the financial impact due to death, disability and critical illness.
1	Planning for security during retirement.
4	Making provision for your children's education.
5	Saving for a specific need.
3	Making a lump-sum investment.

In order to meet these goals, I have recommended the above customer to purchase the following life insurance products :

Life Assured	Product Type	Term	Premium	Frequency	Sum Assured (RM)	Additional Coverage	Bought?
LT GT TEST	AmMetLife Lifestyle	67	1,800.00	Yearly	60,000		Y
USER NAME	Secure Wealth	53	25,779.00	Yearly	60,000	LTRLP, MCIPX	Y

Notes :

You may cancel your life insurance policy by returning the policy document to AmMetLife Insurance Berhad within fifteen (15) days.

#### Description

- \* • After embedded signature, CFFF status is completed.  
• All fields are disabled and cannot modify.
- 1 [Profile History] Button:  
• If CFFF is completed, this is show.  
• Go to "Profiles History" page.
- 2 [View PDF] Button:  
• show CFFF embedded signature PDF.

## 5. Financial Analysis

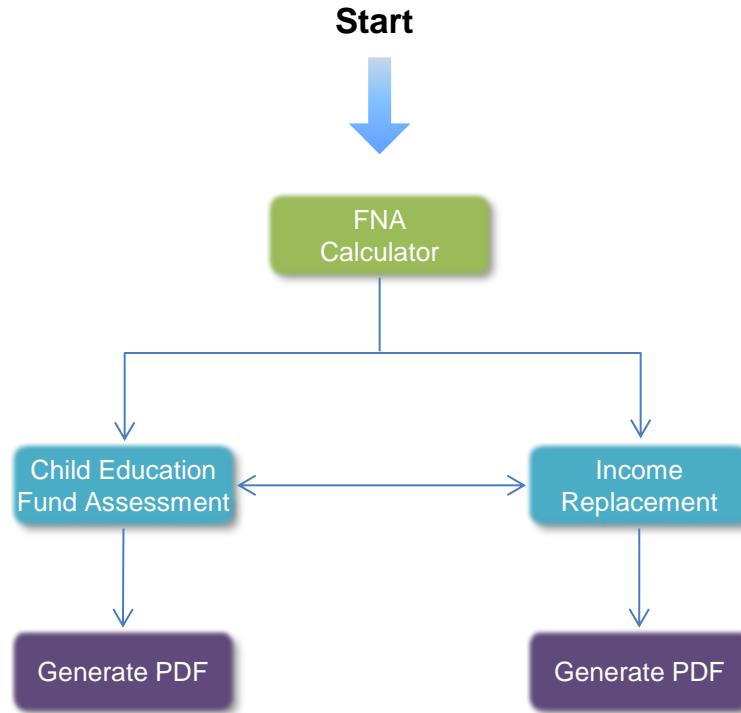
5.1 FNA landing page

5.2 Income Protection

5.3 Child Education

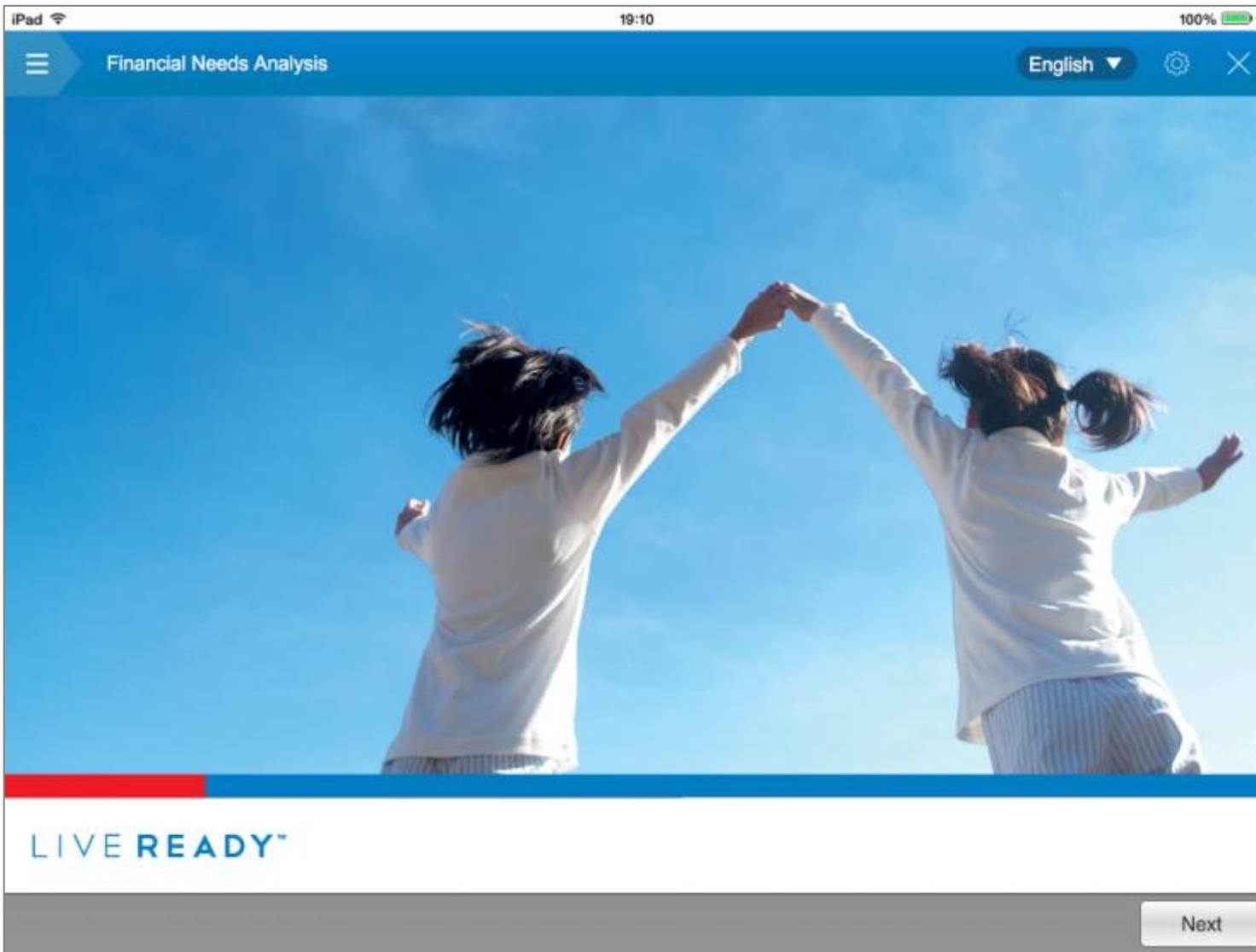
5.4 FNA PDF

# 5.Financial Analysis



## 5. Financial Analysis

### 5.1 FNA landing page



#### Description

- |   |   |
|---|---|
| * | When clicked 'Financial Needs Analysis' button on side menu, display landing image. If coming from other pages (ex. Profiles History, Customer Fact Find), not display. |
|---|---|

## 5. Financial Analysis

### 5.2 Income Replacement Assessment - Entering from side menu

The screenshot shows the 'Income Replacement Assessment' page. At the top, there's a header with 'Financial Needs Analysis' and 'Income Replacement Assessment'. Below the header, there are two tabs: 'Income Replacement Assessment' (selected) and 'Child Education Fund Assessment'. On the right, there's a 'Select Client' button and a language dropdown set to 'English'. A 'Designed For' field (3) is present. In the center, there's a family photo. Below the photo, the 'Income Replacement Assessment' section contains fields for 'Current Annual Income\*' (RM), 'Percentage of Income to be Protected\*' (RM), and 'Desired Income to be Protected' (RM). At the bottom, a progress bar shows the user is on the first step of four: 'Income Replacement Assessment' (marked with a green checkmark), 'Income Protection Assessment', 'Income Needs Analysis', and 'Summary'. A 'Next' button is at the bottom right.

Description	
1	[Income Replacement Assessment] Tab
2	[Select Client] Button: <ul style="list-style-type: none"><li>Show "Search Client Popup"</li><li>If entering from Profiles History or CFFF, this button is hidden.</li></ul>
3	[Designed For] Text Input: <ul style="list-style-type: none"><li>In case entering from main menu, data can be modified.</li></ul>
4	[Percentage of Income to be Protected] Text Input: <ul style="list-style-type: none"><li>Can enter up to 1 decimal place</li></ul>
5	[Desired Income to be Protected] Text input: <ul style="list-style-type: none"><li>The value is auto populated.</li></ul>
6	[Help] Button <ul style="list-style-type: none"><li>Show tooltip for help information.</li></ul>
7	[Next] Button <ul style="list-style-type: none"><li>Go to "Income Protection Assessment" step.</li></ul>

## 5. Financial Analysis

### 5.2 Income Replacement Assessment - Entering from Profiles History or CFFF

The screenshot shows the 'Income Replacement Assessment' page within the 'Financial Needs Analysis' section of the application. The top navigation bar includes icons for iPad, signal strength, battery level (100%), and language selection (English). Below the navigation is a secondary menu with 'Income Replacement Assessment' and 'Child Education Fund Assessment' options.

The main content area features a placeholder image of a family. A red circle with the number '1' highlights the 'Designed For' field, which contains the word 'CLIENT'. Below this, the title 'Income Replacement Assessment' is displayed, followed by three input fields:

- 'Current Annual Income\*' (RM 200,000)
- 'Percentage of Income to be Protected\*' (empty input field with a question mark icon)
- 'Desired Income to be Protected' (RM empty input field)

At the bottom, a progress bar indicates the current step: 'Income Replacement Assessment' (marked with a green checkmark), 'Income Protection Assessment', 'Income Needs Analysis', and 'Summary'. Navigation buttons 'Back' and 'Next' are located at the bottom left and right respectively.

Description	
1	[Designed For] Text Input: • If entering from Profile history or CFFF, auto-populate client name and disable data modification.
2	[Back] Button • Back to previous page. • If entering from side menu. This button is hidden.

# 5. Financial Analysis

## 5.2 Income Replacement Assessment - Tooltip Message

The screenshot shows the 'Income Replacement Assessment' section of the app. At the top, there's a navigation bar with 'Financial Needs Analysis' and 'Income Replacement Assessment'. Below it, a sub-menu has 'Income Replacement Assessment' selected. On the right, there's a 'Select Client' button and a small family photo. The main form area starts with a 'Designed For\*' input field. Under the heading 'Income Replacement Assessment', there are three fields: 'Current Annual Income\*' (RM), 'Percentage of Income to be Protected\*' (%), and 'Desired Income to be Protected'. A red circle with the number '1' is placed near the 'Percentage of Income to be Protected' field. A tooltip window titled 'Tip' is overlaid on this field, containing the text: 'Percentage of income to be protected to keep your family current lifestyles when you are no longer here. Usually, the percentage is derived from your current net income minus all your expenses.' At the bottom, a progress bar shows the user is on the first step ('Income Replacement Assessment'). A 'Next' button is at the bottom right.

### Description

- |   |  |
|---|--|
| 1 | [Tooltip Message]:<br>• If click help button, display tooltip. |
|---|--|

# 5. Financial Analysis

## 5.2 Income Replacement Assessment

10:55 AM  
Not Charging  
English

Financial Needs Analysis      Income Replacement Assessment

Income Replacement Assessment      Child Education Fund Assessment

Designed For \*      USER NAME

**Income Protection Assessment**

Desired Income to be Protected      RM 1 200

Inflation Rate \*      2 %

Projection of Investment Rate \*      2 %

Years of Income Protection \*      Year(s)

Present Value (PV) Capital Requirement (RM)      RM 3 0

Income Replacement Assessment      Income Protection Assessment      Income Needs Analysis      Summary

4 Back      5 Next

### Description

- |   |  |
|---|--|
| 1 | [Desired Income to be Protected] Text Input:<br>• Value entered in previous step is displayed. Can not be modified |
| 2 | • Percentage text input can enter up to 1 decimal point  |
| 3 | [Present Value (PV) Capital Requirement(RM)] Text input:<br>• This value is auto populated.                        |
| 4 | [Back] Button:<br>• Go back “Income Replacement Assessment” step.  |
| 5 | [Next] Button:<br>• After check validation, Go to “Income Needs Analysis” step.                                    |

# 5. Financial Analysis

## 5.2 Income Replacement Assessment

10:56 AM  
Not Charging  
English

Financial Needs Analysis      Income Replacement Assessment

Income Replacement Assessment      Child Education Fund Assessment

Designed For\*      USER NAME

**Income Needs Analysis**

Capital Required to Fund Income Needs      RM 1 3,153

Existing Funds Available to Fund Income Needs\*  
(inclusive of savings, investable assets and sum assured of all insurance policies)

Additional Capital Required to Fund Income Needs      RM 1 3,153 ?

- \*if the value is negative, no additional fund is required.

Income Replacement Assessment      Income Protection Assessment      Income Needs Analysis      Summary

2 Back      3 Next

### Description

- |   |  |
|---|--|
| 1 | <ul style="list-style-type: none"><li>This value is auto populated.</li></ul>                                |
| 2 | [Back] Button: <ul style="list-style-type: none"><li>Go back "Income Protection Assessment" step.</li></ul>  |
| 3 | [Next] Button: <ul style="list-style-type: none"><li>After check validation, Go to "Summary" step.</li></ul> |

# 5. Financial Analysis

## 5.2 Income Replacement Assessment

The screenshot shows the 'Income Replacement Assessment' step of the 'Financial Needs Analysis' process. The top navigation bar includes 'Financial Needs Analysis' (selected), 'Income Replacement Assessment' (current step), and 'Child Education Fund Assessment'. The status bar indicates it's 10:56 AM and the device is not charging. The main content area features a family photo and a summary graph. The graph compares current income (3,153) with required income (2,753), showing a gap of 400. Below the graph is a sales illustration button. At the bottom, a progress bar shows the user has completed steps 1 through 4 and is currently on step 5. Navigation buttons include 'Back' and 'Go to Illustration'.

Designed For\*

**Summary (Graph)**

The amount of RM 1 2,753 would help to ensure that your loved ones and family members can continue the current lifestyle if anything happens to you.

Allow us to use a simple sales illustration to help you close the gap.

Income Replacement Assessment    Income Protection Assessment    Income Needs Analysis    Summary

4 Back    5 Go to Illustration

Description	
1	<ul style="list-style-type: none"><li>This value is auto populated.</li></ul>
2	[Graph] Area
3	[PDF] Button: <ul style="list-style-type: none"><li>Go to PDF view screen after FNA PDF generation</li><li>PDF language selection screen is displayed.</li></ul>
4	[Back] Button: <ul style="list-style-type: none"><li>Go back "Income Needs Analysis" step.</li></ul>
5	[Sales Illustration] Button: <ul style="list-style-type: none"><li>Go to Sales Illustration screen.</li><li>Only enabled after checking PDF.</li></ul>

## 5. Financial Analysis

### 5.2 Income Replacement Assessment - Select Language Option for Generate PDF

iPad 12:07 PM Not Charging

Financial Needs Analysis Child Education Fund Assessment English

Income Replacement Assessment Child Education Fund Assessment

Designed For\* USER NAME  
Child's Name\* MY SON

Summary (Graph)

To accumulate this amount of RM 206,055 that your child's education journey is not disturbed anything happen to you as the payor, we recommend you to add the Payor Benefit Rider on the Payor Benefit Rider for the plan.

Allow us to use a simple sales illustration to help you close the gap.

PDF Language Option

English / Chinese  
 English / BM

Generate

100,000  
50,000  
0

89,608  
68,929  
53,022  
206,055  
5,504

Education Fund Assessment Education Needs Assessment Financial Solution Summary

Back Go to Illustration

Description	
*	Two language option.

# 5. Financial Analysis

## 5.2 Income Replacement Assessment

The screenshot shows the 'Income Replacement Assessment' screen of the MetLife Malaysia MOS application. At the top, there's a header bar with the title 'Income Replacement Assessment'. Below the header, there are two tabs: 'Income Replacement Assessment' (selected) and 'Child Education Fund Assessment'. A 'Select Client' button is located in the top right corner. On the left, there's a 'Designed For\*' field with 'USER NAME' placeholder text. In the center, there's a summary graph showing a total amount of RM 1,310, with RM 810 highlighted in green and RM 500 in red. A tooltip message 'Unregistered customer. Would you like to register a new customer?' appears over the graph, with two options: '1 No' and '2 Yes'. At the bottom, a navigation bar shows the current step: 'Income Replacement Assessment' (with a checkmark), followed by 'Income Protection Assessment', 'Income Needs Analysis', and 'Summary' (also with a checkmark). There are 'Back' and 'Go to Illustration' buttons at the bottom.

### Description

- |   |  |
|---|--|
| * | <ul style="list-style-type: none"><li>• After show FNA PDF, if customer is unregistered. Ask to register customer.</li></ul> |
| 1 | <ul style="list-style-type: none"><li>• If no, client is not registered and can go to SIS.</li></ul>                         |
| 2 | <ul style="list-style-type: none"><li>• If yes, go to New Client screen of Client Data Management Module.</li></ul>          |

# 5. Financial Analysis

## 5.3 Child Education Fund Assessment - Entering from side menu

iPad 19:50 100% English Select Client

Financial Needs Analysis Child Education Fund Assessment

Designed For\* Child's Name\*

**Education Fund Assessment**

Current Education Fees (RM)\* RM

Projection of Education Cost Inflation Rate\* %

Current Age\*

Uni/College Entry Age\*

No. of Years to Uni/College

Projection of Education Cost when your child is years old

Year-1 Year-2 Year-3 Total

Education Fund Assessment Education Needs Assessment Financial Solution Summary

Next

Description	
1	[Child Education Fund Assessment] Tab
2	[Select Client] Button: <ul style="list-style-type: none"> <li>Show "Search Client Popup"</li> <li>If entering from Profiles History or CFFF, this button is hidden.</li> </ul>
3	[Designed For] Text Input: <ul style="list-style-type: none"> <li>In case entering from main menu, data can be modified.</li> </ul>
4	<ul style="list-style-type: none"> <li>Can enter up to 1 decimal place</li> </ul>
5	[Next] Button: <ul style="list-style-type: none"> <li>After check validation, Go to "Education Needs Assessment" step.</li> </ul>

## 5. Financial Analysis

### 5.3 Child Education Fund Assessment - Entering from Profiles History or CFFF

iPad 19:51 100% English X

Financial Needs Analysis Child Education Fund Assessment

Income Replacement Assessment Child Education Fund Assessment

Designed For\*  1

Child's Name\*



**Education Fund Assessment**

Current Education Fees (RM)\* RM

Projection of Education Cost Inflation Rate\* %  ?

Current Age\*

Uni/College Entry Age\*

No. of Years to Uni/College

Projection of Education Cost when your child is years old

Year-1  Year-2  Year-3  Total

Education Fund Assessment Education Needs Assessment Financial Solution Summary

2 Back Next

#### Description

- |   |  |
|---|--|
| 1 | [Designed For] Text Input:<br>• If entering from Profile history or CFFF, auto-populate client name and disable data modification. |
| 2 | [Back] Button<br>• Back to previous page.<br>• If entering from side menu. This button is hidden.                                  |

# 5. Financial Analysis

## 5.3 Child Education Fund Assessment

iPad 12:57 PM Not Charging

Financial Needs Analysis Child Education Fund Assessment English

Income Replacement Assessment Child Education Fund Assessment

Designed For\* USER NAME  
Child's Name\* MY SON



**Education Needs Assessment**

Existing Saving and Investable Available Assets for Education Funding\*: RM [ ]  
Future Yearly Savings and Investment for your child until age 19\*: Yield 1 %  
Projection of Total Savings and Investable Assets for your child at age 19: RM 0  
Additional Fund Required for Education Funding for your child at age 19: RM 187,818 ?

\*if the value is negative, no additional fund is required.

Education Fund Assessment Education Needs Assessment Financial Solution Summary

Back Next

2 3

### Description

- |   |   |
|---|---|
| 1 | <ul style="list-style-type: none"><li>Can enter up to 1 decimal place</li></ul>   |
| 2 | [Back] Button: <ul style="list-style-type: none"><li>Go back "Education Fund Assessment" step.</li></ul>                |
| 3 | [Next] Button: <ul style="list-style-type: none"><li>After check validation, Go to "Financial Solution" step.</li></ul> |

# 5. Financial Analysis

## 5.3 Child Education Fund Assessment

iPad 12:57 PM Not Charging

Financial Needs Analysis > Child Education Fund Assessment English

Income Replacement Assessment Child Education Fund Assessment

Designed For\*  Child's Name\*



**Financial Solution**

Projection of investment return (%)\*  %

Option A Yearly Investment required RM

Option B Monthly Investment required RM

Progress Bar: Education Fund Assessment (Green), Education Needs Assessment (Green), Financial Solution (Green), Summary (Grey)

1 2

### Description

- |   |  |
|---|--|
| 1 | [Back] Button: <ul style="list-style-type: none"><li>Go back "Education Needs Assessment" step.</li></ul>    |
| 2 | [Next] Button: <ul style="list-style-type: none"><li>After check validation, Go to "Summary" step.</li></ul> |

# 5. Financial Analysis

## 5.3 Child Education Fund Assessment

Designed For\*

Child's Name\*

**Summary (Graph)**

To accumulate this amount of RM **183,929** and to ensure that your child's education journey is not disrupted, should anything happen to you as the payor, we recommend that you take on the Payor Benefit Rider for the plan.

Allow us to use a simple sales illustration to help you close the gap.

Education Fund Assessment      Education Needs Assessment      Financial Solution      Summary

Back      Go to Illustration

Description	
1	<ul style="list-style-type: none"><li>This value is auto populated.</li></ul>
2	[Graph] Area
3	<p>[PDF] Button:</p> <ul style="list-style-type: none"><li>Go to PDF view screen after FNA PDF generation</li><li>In case customer not an existing customer, prompt user if they want to save the customer.</li><li>PDF language selection screen is displayed.</li></ul>
4	[Back] Button: <ul style="list-style-type: none"><li>Go back "Financial Solution" step.</li></ul>
5	[Sales Illustration] <ul style="list-style-type: none"><li>Go to Sales Illustration screen.</li><li>Only enabled after checking PDF.</li></ul>

## 5. Financial Analysis

### 5.4 FNA PDF

iPad 12:58 PM Not Charging

Child Education.pdf Print Open In...

AmMetLife Insurance Berhad (15743-P)  
(Formerly known as AmLife Insurance Berhad) Licensed Insurer  
Level 19, Menara AmMetLife, No. 1, Jalan Lumut, 50400 Kuala Lumpur  
1300 88 8800 +603 2171 3000 customercare@ammetlife.com  
Type AML<space>message send to 33911 ammetlife.com

AmMetLife

### Child Education Fund Assessment

教育基金评估

Designed for  
为您特设

USER NAME

1. Education Fund Assessment  
教育基金评估

Child's Name 孩子名字	Current Education Fees (for a year) 目前教育费用 (一年)	Projection of Education Cost Inflation rate 估计教育费通胀	Current Age 当前年龄	Uni/College Entry Age 进升大学年龄	No. of Year to Uni/College 距离入大学的年差
MY SON	10,000	20%	10	19	9

2. Projection of Education Cost when your child is 10 years old  
当您的孩子达 10 岁时的估计升学费

for Year-1 第一年	for Year-2 第二年	for Year-3 第三年	Total Projection of Education Cost for 3-Year 估计3年升学费用总数
51,598	61,918	74,302	187,818

3. Existing Saving and Investable Available Assets for Education Funding  
目前供升学用途的储蓄与投资

500	Yield 回报	3%
-----	-------------	----

4. Future Yearly Savings and Investment for your child until age 19  
未来每年储蓄与投资直至您的孩子达 19 岁

240	Yield 回报	8%
-----	-------------	----

5. Projection of Total Savings and Investable Assets for your child at age 19  
估计总储蓄与投资额直至您的孩子达 19 岁

3,889
-------

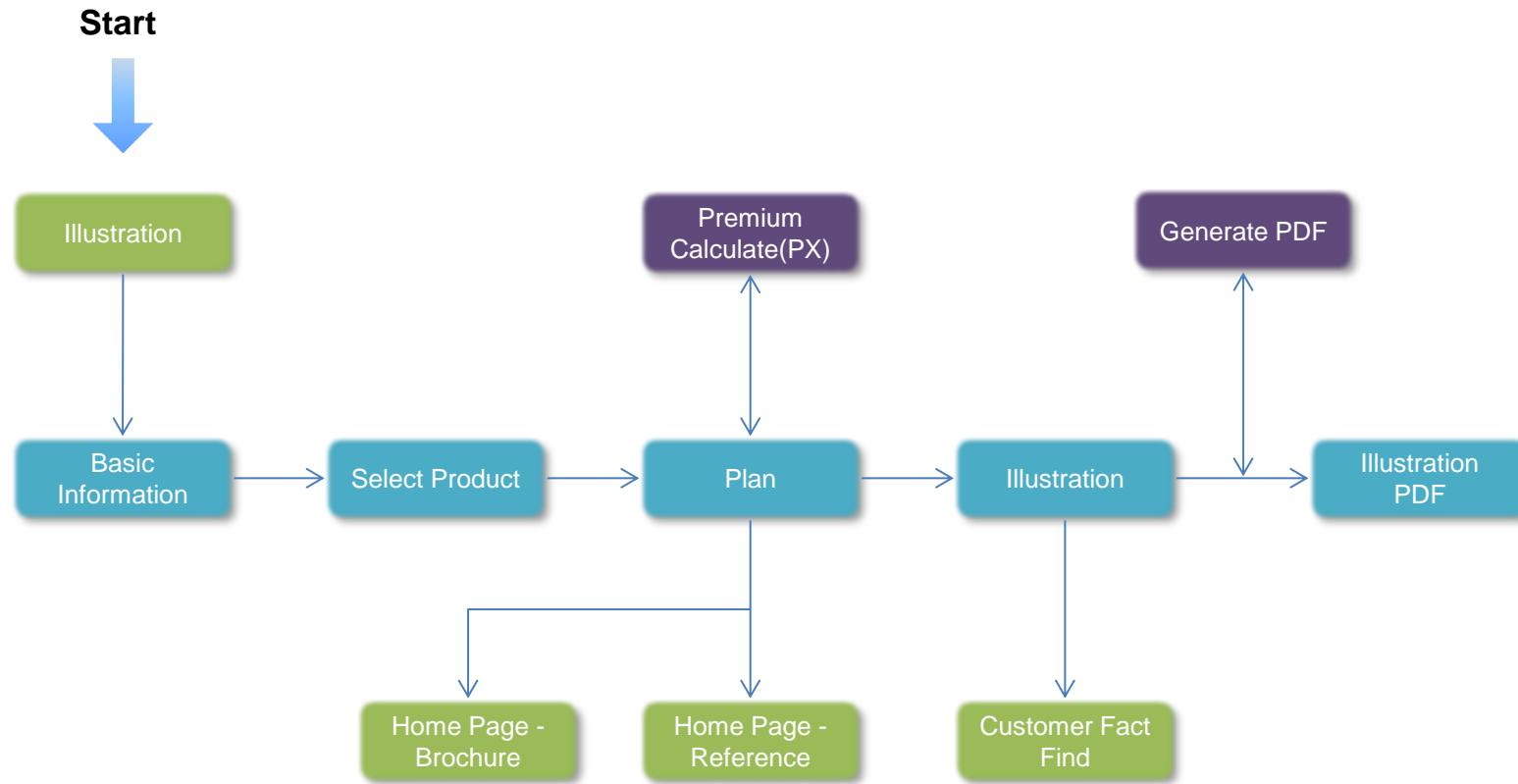
### Description

\* PDF is used to view FNA results.

## 6. Sales Illustration

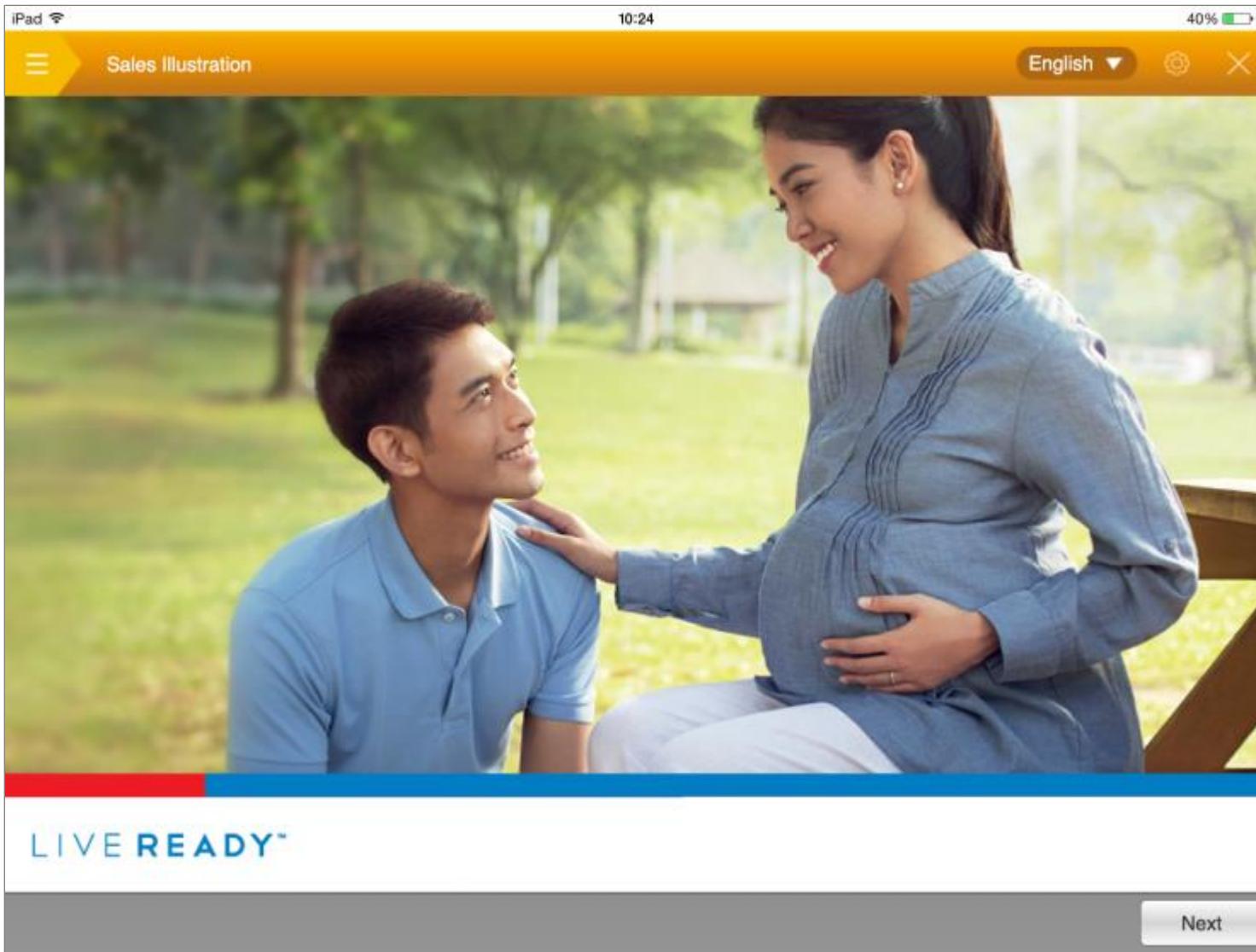
- 6.1 SIS landing page
- 6.2 Basic Information
- 6.3 Select Product
- 6.4 Plan
- 6.5 Illustration
- 6.6 Illustration PDF

# 6.Sales Illustration



## 6. Sales Illustration

### 6.1 SIS landing page



#### Description

- |   |  |
|---|--|
| * | When clicked 'Sales Illustration' button on side menu, display landing image.<br>If coming from other pages (ex. Profiles History, Financial Needs Analysis, Customer Fact Find), not display. |
|---|--|

## 6. Sales Illustration

### 6.2 Basic Information (1/2) - Life Assured and Policy owner are not same.

iPad WiFi      10:24      40%

Sales Illustration > Basic Information      English

Basic Information Select Product Plan Illustration Select Client

• Life Assured Details

Salutation Life Assured's Name\*

DOB

Gender\* Male Female

Occupation\*

Is life assured the policy owner? Yes No

Next

Description	
*	<p>Following scenario can be followed.</p> <ul style="list-style-type: none"> <li>Case 1 : Linked from CFFF. Agent can link from other module or select client from “select client” button.</li> <li>Case 2 : Client data can be entered. (At this point, not stored in client info) MOS will prompt the user if client data should be stored AFTER generating illustration.</li> </ul>
*	<p>Mandatory Field - Life Assured Details</p> <ul style="list-style-type: none"> <li>Life Assured's Name, ANB, Gender, Smoking Habit, Occupation, Occupation Class</li> </ul>
1	<p>[Select Client] Button:</p> <ul style="list-style-type: none"> <li>If the module comes directly , this is displayed.</li> <li>Generate illustration after user complete other module, this is hidden.</li> </ul>
2	<p>[DOB] Date Picker:</p> <ul style="list-style-type: none"> <li>If select date, ANB is auto calculate.</li> </ul>
3	<p>[Search Occupation] Button:</p> <ul style="list-style-type: none"> <li>Show Search Occupation Popup</li> </ul>
4	<p>[Is Insured the same as policy owner?] Radio:</p> <ul style="list-style-type: none"> <li>Yes - hide policy owner details</li> <li>No - display policy owner details</li> <li>Default : Yes</li> </ul>
5	<p>[Next] Button:</p> <ul style="list-style-type: none"> <li>If Relationship is spouse, check validation for gender.</li> <li>Go to “Select Product” tab</li> </ul>

## 6. Sales Illustration

### 6.2 Basic Information (2/2) - Life Assured and Policy owner are same.

iPad WiFi 10:24 40% English

Sales Illustration Basic Information

Basic Information Select Product Plan Illustration Select Client

• Life Assured Details

Salutation Select Life Assured's Name\*

DOB ANB\*

Gender\* Male Female Smoking Habit\*

Occupation\* Occupation Class\*

Is life assured the policy owner? Yes No

• Policy Owner Details

Policy Owner's Name\* Relationship 1 Parent

DOB ANB\*

Gender\* Male Female Smoking Habit\*

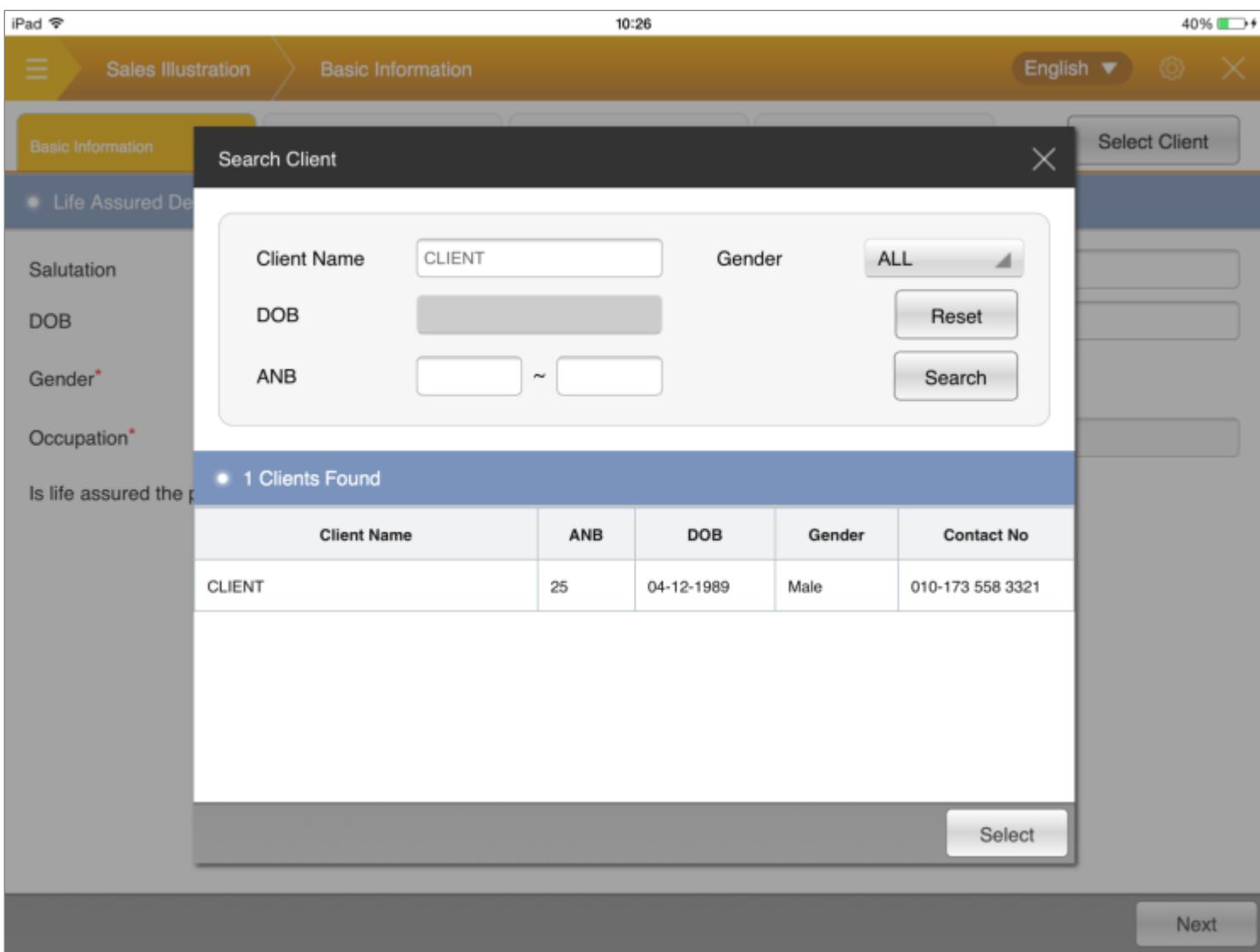
Occupation\* Occupation Class\*

Next

Description	
*	Mandatory Field - Policy Owner Details • Policy Owner's Name, ANB, Gender, Smoking Habit, Occupation, Occupation Class
1	[Relationship] Dropdown: • Parent, Spouse, Others

## 6. Sales Illustration

### 6.2 Basic Information - Search Client Popup

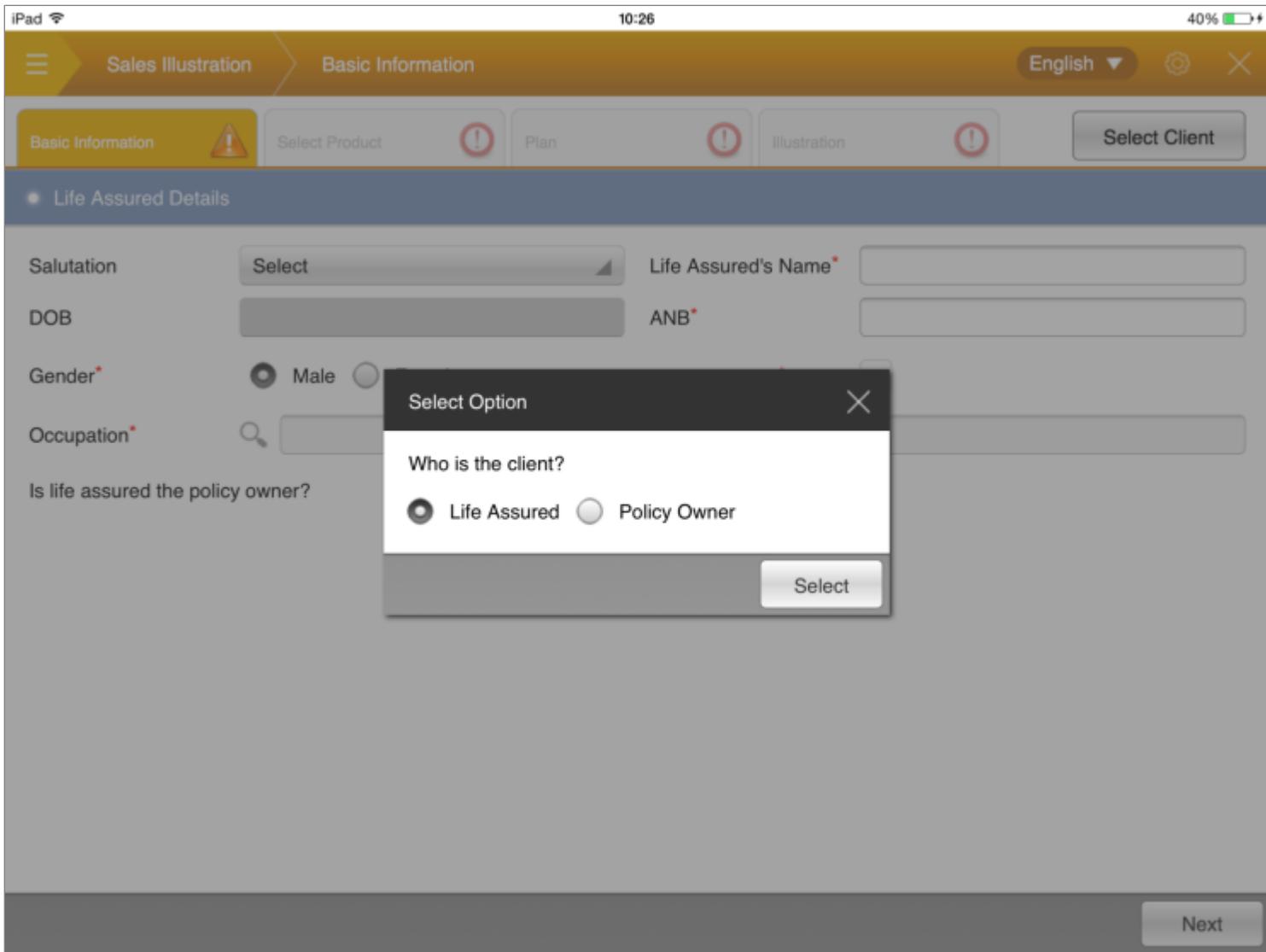


#### Description

\* If the module comes directly , first user should select client.

## 6. Sales Illustration

### 6.2 Basic Information - Search Client Popup(Select Option)

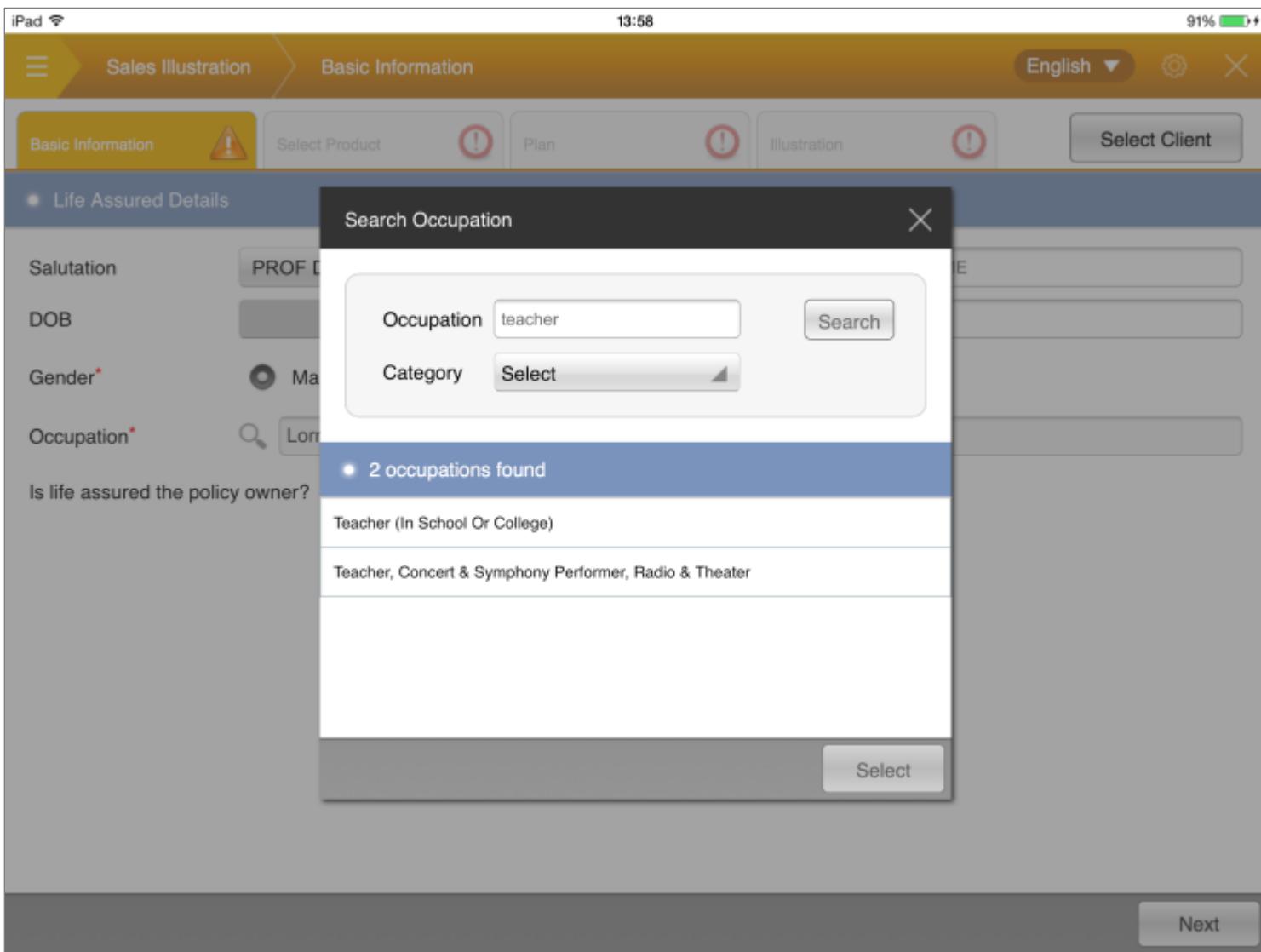


#### Description

- \* [Select Option] Popup:  
•Selected client info auto populate to Policy Insured info or  
•If select policy owner, Is insured the same as policy owner is No.

## 6. Sales Illustration

### 6.2 Basic Information - Search Occupation Popup



#### Description

*	Search result is Filtered by Occupation & Category.
---	---

## 6. Sales Illustration

### 6.3 Select Product - (1/2)

The screenshot shows the 'Select Product' screen of the MetLife Malaysia Sales Illustration app. At the top, there's a header bar with 'Sales Illustration' and 'Select Product' tabs, and a language setting for 'English'. Below the header, there are three main categories: 'Protection' (represented by a family photo), 'Wealth' (represented by a hand watering a plant shaped like a dollar sign), and 'Health' (represented by hands holding a family silhouette). Each category has a small icon above it. At the bottom, there are two navigation buttons: 'Back' on the left and 'Next' on the right.

Description	
*	Products are filtered by age and gender of policy insured.
*	Product Category & Product: <ul style="list-style-type: none"><li>• Protection - AmMetLife Protect 99, AmMetLife Lifestyle, AmMetLife Link</li><li>• Wealth - AmMetLife Secure Builder, AmMetLife SecureGuard Plus, Secure Wealth, AmCapital</li><li>• Health - AmLife SecureCare, AmMetLife Medic Flexi</li></ul>
1	[Back] Button: <ul style="list-style-type: none"><li>• Go back "Basic Information" tab.</li></ul>
2	[Next] Button: <ul style="list-style-type: none"><li>• Go to "Plan" tab.</li></ul>

# 6. Sales Illustration

## 6.3 Select Product - (2/2)

The screenshot shows the 'Sales Illustration' app interface on an iPad. The top bar includes icons for signal strength, battery level (40%), and time (10:27). The main title is 'Sales Illustration' and the sub-section is 'Select Product'. Below this, there are tabs for 'Basic Information' (green checkmark), 'Select Product' (highlighted in green), 'Plan' (yellow warning sign), and 'Illustration' (red exclamation mark). The 'English' language setting is selected.

The screen is divided into three main product categories:

- Protection:** Shows a family photo.
- Wealth:** Shows a hand watering a plant shaped like a dollar sign. This category is selected, indicated by a green background.
- Health:** Shows a hand holding a small human figure.

Below the categories, four specific products are listed:

- AmMetLife SecureBuilder:** Shows a family photo. It is highlighted with a red border and has a red checkmark icon in the top right corner.
- AmMetLife SecureGuard Plus:** Shows a group of business people at a desk.
- Secure Wealth:** Shows a person carrying a child while flying a kite.
- AmCapital:** Shows a nest containing gold eggs.

At the bottom are 'Back' and 'Next' buttons.

Description	
*	Products are filtered by age and gender of policy insured.
*	Product Category & Product: •Protection - AmMetLife Protect 99, AmBeautiful, AmMetLife Lifestyle, AmMetLife Link •Wealth - AmMetLife Secure Builder, AmMetLife SecureGuard Plus, Am3Gen+ Premium, AmCapital •Education - AmUni Education •Health - AmMetLife SecureCare, AmMetLife Medic Flexi
1	Product Group select Icon • Selected product group is marked as a green color
2	① Products for selected product type is displayed
3	Product select Icon • Selected product is marked with a red check sign at the upper right corner

# Plan - AmMetLife Lifestyle

# 6. Sales Illustration

## 6.4 Plan - AmMetLife Lifestyle

The screenshot shows the AmMetLife Lifestyle Sales Illustration app interface on an iPad. The top bar displays the device as an iPad with Wi-Fi, the time as 10:43, and battery level at 43%. The main header includes 'Sales Illustration' and 'Plan' tabs, with 'Plan' selected. Below the header, there are tabs for 'Basic Information' (green checkmark), 'Select Product' (green checkmark), 'Plan' (yellow warning icon), 'Illustration' (red exclamation icon), and 'Fund Type', 'Top Up', 'Preference', and 'Calculate' buttons.

**Basic Plan:**

- Plan Code: ULLA5
- Plan Name: AmMetLife Lifestyle
- Policy Term: 74
- Premium Term: 74
- Sum Assured (RM): (empty)
- Yearly Premium (RM): (empty)
- Insurance Portion: (empty)
- Payment Frequency: Yearly

**Riders:**

	Code	Rider Name	Term	Sum Assured
<input type="checkbox"/>	LTR+	Level Term Rider	<a href="#">i</a>	<input type="checkbox"/> RM <input type="checkbox"/>
<input type="checkbox"/>	RICIR01TNU	Critical Illness Rider	<a href="#">i</a>	<input type="checkbox"/> RM <input type="checkbox"/>
<input type="checkbox"/>	DDIB+	Deferred Disability Income Rider	<a href="#">i</a>	<input type="checkbox"/> RM <input type="checkbox"/>
<input type="checkbox"/>	DWPW+	Dread Disease Waiver of Premium Rider	<a href="#">i</a>	<input type="checkbox"/> <input type="checkbox"/>
<input type="checkbox"/>	CAIB+	Comprehensive Accident Indemnity Rider	<a href="#">i</a>	<input type="checkbox"/> RM <input type="checkbox"/>

Premium (RM):  Yearly  Half Yearly  Quarterly  Monthly

Buttons at the bottom: Back, Reference, Brochure.

### Description

- \* • Different set of Attributes and Riders could be combined for each product, and it offers different kind of options in this Plan Tab.
- \* • Plan for AmMetLife Lifestyle product.
  - Option : Fund Type, Top up, Preference
- \* Attachable Riders
  - Accident Benefit Rider
  - AmMedic Flexi Plus Rider Plan 1
  - AmMedic Flexi Plus Rider Plan 2
  - AmMedic Flexi Plus Rider Plan 3
  - AmMedic Flexi Plus Rider Plan 4
  - Hospitalisation Benefit Rider
  - Multi Critical Illness Shield Rider
  - Comprehensive Accident Indemnity Rider
  - Critical Illness Term Rider
  - Level Term Rider
  - Deferred Disability Income Rider
  - Dread Disease Waiver of Premium Rider
  - Payor Benefit Rider
  - Payor Level Term Rider
  - Payor Critical Illness Term Rider
  - Payor Dread Disease Waiver of Premium Rider
  - Payor Comprehensive WOP
  - Critical Illness Rider

# 6. Sales Illustration

## 6.4 Plan - AmMetLife Lifestyle

The screenshot shows the AmMetLife Lifestyle Sales Illustration Plan screen. At the top, there are tabs for Basic Information, Select Product, Plan, Illustration, and Calculate. The Plan tab is selected. Below the tabs, there are fields for Plan Code (ULLA5), Plan Name (AmMetLife Lifestyle), Policy Term (74), Premium Term (74), Sum Assured (RM) (5), Insurance Portion, Yearly Premium (RM), Payment Frequency (Yearly), and Rider information for Level Term Rider, Critical Illness Rider, Deferred Disability Income Rider, Dread Disease Waiver of Premium Rider, and Comprehensive Accident Indemnity Rider. Premium frequency options include Yearly, Half Yearly, Quarterly, and Monthly. At the bottom, there are buttons for Back, Reference, and Brochure.

- 1 [Fund Type] Button:  
• Show Fund Type Popup  
• Only ILP product, show this button
- 2 [Top Up] Button:  
• Show Top Up Popup
- 3 [Preference] Button:  
• Show Calculate Option Popup
- 4 [Calculate] Button:  
• After calculate premium, results are bind to bottom fields.
- 5 [Insurance Portion] Label:  
• Underlined title will have tooltip
- 6 [Payment Frequency] Dropdown:  
• Annually, Half Yearly, Quarterly, Monthly, Monthly(Biro Angkasa), Monthly(Worksite Mktg Salary Deduction), Monthly(Salary Deduction), EPP
- 7 [Rider Info] Button:  
• Show rider information popup.
- 8 [Back] Button:  
• Go back “Select Product” tab.
- 9 [Reference] Button:  
• Go to reference of Home page in order to show ILF information PDF
- 10 [Brochure] Button:  
• Go to brochure of Home page

### Description

# 6. Sales Illustration

## 6.4 Plan - Preference for AmMetLife Lifestyle

The screenshot shows the AmMetLife Sales Illustration app interface on an iPad. The main screen displays a navigation bar with 'Sales Illustration' and 'Plan' tabs, and a toolbar with 'Basic Information', 'Select Product', 'Plan', 'Illustration', 'Fund Type', 'Top Up', 'Preference', and 'Calculate' buttons. A sidebar on the left lists 'Basic Plan' and 'Riders' sections, with 'Riders' currently selected. The main content area shows a table of rider options like LTR+, RICIR01TNU, DDIB+, DWPW+, and CAIB+. At the bottom, there are buttons for Premium (RM) selection (Yearly, Half Yearly, Quarterly, Monthly) and links for Reference and Brochure.

A modal dialog box titled 'Preference' is open in the center. It contains three sections:

- Policy Sustainability** (Section 1): Contains radio buttons for 'Up to Age 60', 'Up to Age 85', 'Up to Age 99', and 'Up to ANB'. The 'Up to ANB' option is highlighted with a red circle containing the number 2.
- Cash Value (CV) / Surrender Value (SV) Projection** (Section 3): Contains input fields for 'Target CV/SV' and 'ANB'.
- Other Options** (Section 2): Contains a text input field with a placeholder '(Optional)'.

A 'Save' button is at the bottom of the dialog.

Description	
*	Preference list will be displayed based on selected product.
*	1. Policy Sustainability 2. Cash Value(CV) / Surrender Value (SV) Projection
1	[Policy Sustainability] Option: • If checked, radio buttons are enabled.
2	[Other input for Policy Sustainability option] • If select Up to ANB, this is enabled.
3	[Cash Value(CV) / Surrender Value(SV) Projection] Option: • If checked, inputs are enabled.

# Plan - AmMetLife Link

# 6. Sales Illustration

## 6.4 Plan - AmMetLife Link

The screenshot shows the AmMetLife Link Sales Illustration app interface on an iPad. The top bar displays the device as an iPad with signal, time (10:45), battery level (43%), and connectivity icons. The main header reads "Sales Illustration" and "Plan". The sub-header "Basic Information" and "Select Product" are marked with green checkmarks, while "Plan" has a yellow warning icon. The "Illustration" tab is marked with a red exclamation icon.

**Basic Plan**

Plan Code	ULRP6	Plan Name	AmMetLife Link
Policy Term	60	Premium Term	60
Sum Assured (RM)		Yearly Premium (RM)	
Insurance Portion		Payment Frequency	Yearly

**Riders**

	Code	Rider Name	Term	Sum Assured
<input type="checkbox"/>	LTR+	Level Term Rider	<i>i</i>	<input type="checkbox"/> RM <input type="text"/>
<input type="checkbox"/>	RICIR01TNU	Critical Illness Rider	<i>i</i>	<input type="checkbox"/> RM <input type="text"/>
<input type="checkbox"/>	CIT+	Critical Illness Term Rider	<i>i</i>	<input type="checkbox"/> RM <input type="text"/>
<input type="checkbox"/>	DDIB+	Deferred Disability Income Rider	<i>i</i>	<input type="checkbox"/> RM <input type="text"/>
<input type="checkbox"/>	DWPW+	Dread Disease Waiver of Premium Rider	<i>i</i>	<input type="checkbox"/>

Premium (RM):  Yearly  Half Yearly  Quarterly  Monthly

Back Reference Brochure

Description	
*	<ul style="list-style-type: none"> <li>• Plan for AmMetLife Link product.</li> <li>• Option: Fund Type, Top Up, Preference</li> </ul>
*	<ul style="list-style-type: none"> <li>• Attachable Riders</li> <li>• Accident Benefit Rider</li> <li>• AmMedic Flexi Plus Rider Plan 1</li> <li>• AmMedic Flexi Plus Rider Plan 2</li> <li>• AmMedic Flexi Plus Rider Plan 3</li> <li>• AmMedic Flexi Plus Rider Plan 4</li> <li>• Hospitalisation Benefit Rider</li> <li>• Multi Critical Illness Shield Rider</li> <li>• Comprehensive Accident Indemnity Rider</li> <li>• Critical Illness Term Rider</li> <li>• Level Term Rider</li> <li>• Deferred Disability Income Rider</li> <li>• Dread Disease Waiver of Premium Rider</li> <li>• Payor Benefit Rider</li> <li>• Payor Level Term Rider</li> <li>• Payor Critical Illness Term Rider</li> <li>• Payor Dread Disease Waiver of Premium Rider</li> <li>• Payor Comprehensive WOP</li> <li>• Critical Illness Rider</li> </ul>

# 6. Sales Illustration

## 6.4 Plan - Preference for AmMetLife Link

The screenshot shows the AmMetLife Link Sales Illustration application interface on an iPad. The top bar displays 'iPad WiFi', the time '10:45', and battery level '43%'. The main navigation bar includes 'Sales Illustration', 'Plan', 'English', and other settings. Below this, a sub-navigation bar shows 'Basic Information' and 'Select Product' as completed steps, while 'Plan' is currently active. A warning icon is present above the sub-navigation. The main content area is titled 'Basic Plan' and contains sections for 'Plan Code', 'Policy Term', 'Sum Assured (RM)', 'Insurance Portion', and 'Riders'. The 'Riders' section lists several options like LTR+, RICIR01TNU, CIT+, DDIB+, and DWPW+. At the bottom, premium frequency options are shown: 'Premium (RM)': Yearly, Half Yearly, Quarterly, Monthly. A 'Back' button is at the bottom left, and 'Reference' and 'Brochure' buttons are at the bottom right. A modal dialog box titled 'Preference' is open, containing two sections: 'Policy Sustainability' with radio buttons for 'Up to Age 60', 'Up to Age 85', and 'Up to ANB'; and 'Cash Value (CV) / Surrender Value (SV) Projection' with input fields for 'Target CV/SV' and 'ANB'. A 'Save' button is at the bottom of the dialog.

Description	
*	Preference Option is same as AmMetLife Lifestyle product.
*	1.Policy Sustainability 2.Cash Value(CV) / Surrender Value (SV) Projection

# Plan - AmMetLife Protect 99

# 6. Sales Illustration

## 6.4 Plan - AmMetLife Protect 99

The screenshot shows the AmMetLife Protect 99 Sales Illustration app interface. At the top, there are tabs for Basic Information (green checkmark), Select Product (green checkmark), Plan (red exclamation mark), and Illustration (red exclamation mark). The Plan tab is selected. Below the tabs, it says "Basic Plan". The "Plan Code" field contains "PRT99" (marked with a red circle and number 1). The "Plan Option" dropdown is set to "Regular Payment" (marked with a red circle and number 2). The "Premium Term" is listed as "74". The "Sum Assured (RM)" is "60,000". The "Payment Frequency" is "Yearly". In the "Riders" section, there is a table with columns: Rider Name, Term, Sum Assured, and Premium. It lists four riders: Critical Illness Term Rider (Term 40, Sum Assured RM 30,000), Level Term Rider (Term 30, Sum Assured RM 20,000), Dread Disease Waiver of Premium Rider (Term 40, Sum Assured RM 0), and AmMedic Flexi Plus Rider (Term 20, Sum Assured RM 0). The Hospitalisation Benefit Rider is not checked. At the bottom, there are buttons for Premium (RM) options: Yearly, Half Yearly, Quarterly, and Monthly. Navigation buttons include Back, Reference, and Brochure.

Description	
*	<ul style="list-style-type: none"> <li>• Plan for AmMetLife Protect 99.</li> <li>• Option: None.</li> </ul>
*	<ul style="list-style-type: none"> <li>• Attachable riders</li> <li>• Accident Benefit Rider</li> <li>• AmMedic Flexi Plus Rider Plan 1</li> <li>• AmMedic Flexi Plus Rider Plan 2</li> <li>• AmMedic Flexi Plus Rider Plan 3</li> <li>• AmMedic Flexi Plus Rider Plan 4</li> <li>• Hospitalisation Benefit Rider</li> <li>• Multi Critical Illness Shield Rider</li> <li>• Comprehensive Accident Indemnity Rider</li> <li>• Critical Illness Term Rider</li> <li>• Level Term Rider</li> <li>• Deferred Disability Income Rider</li> <li>• Dread Disease Waiver of Premium Rider</li> <li>• Payor Benefit Rider</li> <li>• Payor Critical Illness Term Rider</li> <li>• Payor Dread Disease Waiver of Premium Rider</li> <li>• Payor Level Term Rider</li> </ul>
1	<p>[Plan Code] Text Input:</p> <ul style="list-style-type: none"> <li>• Disabled.</li> <li>• Plan code is depend on plan term option selected: <ul style="list-style-type: none"> <li>• If Premium Term up to age 20 years, plan code is PRT20</li> <li>• If Premium Term up to age 25 years, plan code is PRT25</li> <li>• If Premium Term up to the policy term, plan code is PRT99</li> </ul> </li> </ul>
2	<p>[Plan Option] Dropdown:</p> <ul style="list-style-type: none"> <li>• Premium Term up to 20 years, Premium Term up to 25 years, Premium Term up to the policy term (i.e. up to age 99)</li> </ul>

# Plan - AmMetLife SecureBuilder

# 6. Sales Illustration

## 6.4 Plan - AmMetLife SecureBuilder

10:29  
40%

**Sales Illustration** **Plan** English **Preference** **Calculate**

**Basic Plan**

Plan Code	ALSB	Plan Name	AmMetLife SecureBuilder
Plan Option	① Plan1	Policy Term	15
Premium Term	6	Sum Assured (RM)	
Yearly Premium (RM)	②	Payment Frequency	Yearly

**Riders**

Code	Rider Name	Term	Sum Assured	Premium
MCIPX	Multi Critical Illness Shield Rider	③	RM	RM
DWPX	Dread Disease Waiver of Premium Rider	④		RM

Premium (RM): **Yearly** **Half Yearly** **Quarterly** **Monthly**

**Back** **Reference** **Brochure**

Description	
*	<ul style="list-style-type: none"> <li>• Plan for AmMetLife SecureBuilder.</li> <li>• Option: Preference.</li> </ul>
*	<ul style="list-style-type: none"> <li>• Attachable Rider</li> <li>• Dread Disease Waiver of Premium</li> <li>• Multi Critical Illness Shield Rider</li> <li>• Payer Benefit Rider</li> <li>• Payer Dread Disease Waiver of Premium Rider</li> </ul>
1	<ul style="list-style-type: none"> <li>[Plan Option] Dropdown:           <ul style="list-style-type: none"> <li>• Plan 1 - Premium term 6 years, Policy Term 15 years</li> <li>• Plan 2 - Premium term 6 years, Policy Term 20 years</li> <li>• Plan 3 - Premium term 10 years, Policy Term 20 years</li> <li>• Plan 4 - Premium term 10 years, Policy Term 25 years</li> </ul> </li> <li>• Term, Premium Term data will be auto-populated based on selected option.</li> </ul>
2	<ul style="list-style-type: none"> <li>[Yearly Premium(RM)] Text input:           <ul style="list-style-type: none"> <li>• Disable input</li> <li>• Value will be populated when Calculate button is clicked.</li> </ul> </li> </ul>

## 6. Sales Illustration

### 6.4 Plan - Preference for AmMetLife SecureBuilder

The screenshot shows the AmMetLife SecureBuilder Sales Illustration app interface on an iPad. The top navigation bar includes 'Sales Illustration', 'Plan', 'English', and a battery icon at 41%. Below the navigation is a toolbar with 'Basic Information', 'Select Product', 'Plan', 'Illustration', and a warning icon. The main content area shows 'Basic Plan' selected. A modal dialog titled 'Preference' is open, containing the following options:

- Guaranteed Cash Payment & Cash Dividend Option**
  - Leave with company to accumulate with interest
  - Withdraw every year
- Cash Value (CV) / Surrender Value (SV) Projection**
  - Target CV/SV
  - ANB

A 'Save' button is at the bottom of the dialog. At the bottom of the screen, there are buttons for 'Premium (RM): Yearly', 'Half Yearly', 'Quarterly', 'Monthly', 'Back', 'Reference', and 'Brochure'.

Description	
*	1.Guaranteed Cash Payment & Cash Dividend Option 2.Cash Value(CV) / Surrender Value (SV) Projection
1	[Guaranteed Cash Payment & Cash Dividend Option]: <ul style="list-style-type: none"><li>Default : Leave with company to accumulate with interest</li></ul>

# Plan - AmMetLife SecureGuard Plus

# 6. Sales Illustration

## 6.4 Plan - AmMetLife SecureGuard Plus

The screenshot shows the AmMetLife SecureGuard Plus Sales Illustration app interface on an iPad. The top bar includes icons for signal, battery level (41%), and time (10:32). The main header has tabs: Sales Illustration, Plan, English, and a gear icon. Below the header, there are four status indicators: Basic Information (green checkmark), Select Product (green checkmark), Plan (yellow warning sign), and Illustration (red exclamation mark). The 'Basic Plan' section is selected, showing the following details:

- Plan Code:** BTASGP1EPA
- Plan Name:** AmMetLife SecureGuard Plus
- Policy Term:** 21
- Premium Term:** 21
- Sum Assured (RM):** (empty input field)
- Yearly Premium (RM):** (empty input field)
- Payment Frequency:** Yearly

The 'Riders' section is expanded, listing five available riders:

	Code	Rider Name	Term	Sum Assured	Premium
<input type="checkbox"/>	CITX	Critical Illness Term Rider		<input type="text"/>	RM <input type="text"/>
<input type="checkbox"/>	LTRX	Level Term Rider		<input type="text"/>	RM <input type="text"/>
<input type="checkbox"/>	CAILP	Comprehensive Accident Indemnity Rider		<input type="text"/>	RM <input type="text"/>
<input type="checkbox"/>	HBRLP	Hospitalisation Benefit Rider		<input type="text"/>	RM <input type="text"/>
<input type="checkbox"/>	ABLP	Accident Benefit Rider		<input type="text"/>	RM <input type="text"/>

At the bottom, there are buttons for Premium (RM) selection: Yearly, Half Yearly, Quarterly, and Monthly. Navigation buttons include Back, Reference, and Brochure.

Description	
*	<ul style="list-style-type: none"> <li>• Plan for AmMetLife SecureGuard Plus.</li> <li>• Option: Preference.</li> </ul>
*	<ul style="list-style-type: none"> <li>• Attachable Riders             <ul style="list-style-type: none"> <li>• Accident Benefit Rider</li> <li>• AmMedic Flexi Plus Rider Plan 1</li> <li>• AmMedic Flexi Plus Rider Plan 2</li> <li>• AmMedic Flexi Plus Rider Plan 3</li> <li>• AmMedic Flexi Plus Rider Plan 4</li> <li>• Comprehensive Accident Indemnity Rider</li> <li>• Critical Illness Term Rider</li> <li>• Deferred Disability Income Rider</li> <li>• Hospitalisation Benefit Rider</li> <li>• Level Term Rider</li> <li>• Multi Critical Illness Shield Rider</li> <li>• Payor Benefit Rider</li> <li>• Payor Critical Illness Term Rider</li> <li>• Payor Dread Disease Waiver of Premium Rider</li> <li>• Payor Level Term Rider</li> </ul> </li> </ul>

# 6. Sales Illustration

## 6.4 Plan - Preference for AmMetLife SecureGuard Plus

The screenshot shows the AmMetLife SecureGuard Plus Sales Illustration application interface. At the top, there's a navigation bar with 'Sales Illustration' and 'Plan' tabs, and a language setting for 'English'. Below the navigation is a sidebar with sections for 'Basic Information', 'Select Product', 'Plan' (which is currently selected), and 'Illustration'. The main content area shows a 'Basic Plan' configuration with fields for 'Plan Code' (set to '21'), 'Sum Assured (RM)' (set to '20000'), 'Payment Frequency' (set to 'Yearly'), and a 'Riders' section listing options like CITX, LTRX, CAILP, HBRLP, and ABPLP. A 'Preference' dialog box is overlaid on the screen. It has a title 'Guaranteed Cash Payment & Cash Dividend Option' and two radio button options: 'Leave with company to accumulate with interest' (selected) and 'Withdraw every year'. Below this is a section titled 'Coverage Option' with a checkbox for 'Extended Coverage Option' (unchecked). Further down is a 'Cash Value (CV) / Surrender Value (SV) Projection' section with fields for 'Target CV/SV' and 'ANB', both of which are empty. At the bottom of the dialog is a 'Save' button.

Description	
*	1.Guaranteed Cash Payment & Cash Dividend Option 2.Coverage Option 3.Cash Value(CV) / Surrender Value (SV) Projection
1	[Coverage Option] • If extended coverage is selected, the Policy Term will be extended 10 years.

# Plan - Secure Wealth

# 6. Sales Illustration

## 6.4 Plan - Secure Wealth

The screenshot shows the MetLife Malaysia MOS UI/UX Sales Illustration Plan screen. At the top, there are tabs for Basic Information (green checkmark), Select Product (green checkmark), Plan (yellow warning icon), and Illustration (red exclamation mark). The Plan tab is selected. Below the tabs, there are sections for Plan Code (BTAS3G1WPA), Plan Name (Secure Wealth), Policy Term (60), Premium Term (5), Sum Assured (RM) (empty), Yearly Premium (RM) (empty), and Payment Frequency (Yearly). A section for Riders follows, listing five options: Critical Illness Term Rider, Level Term Rider, Multi Critical Illness Shield Rider, Dread Disease Waiver of Premium Rider, and Accident Benefit Rider. Each rider has an info icon (i) and fields for Term (checkbox), Sum Assured (RM), and Premium (RM). At the bottom, there are buttons for Premium (RM) selection (Yearly, Half Yearly, Quarterly, Monthly) and navigation (Back, Reference, Brochure).

Description	
*	<ul style="list-style-type: none"> <li>• Plan for Secure Wealth.</li> <li>• Option: Preference.</li> </ul>
*	<ul style="list-style-type: none"> <li>• Attachable Rider</li> <li>• Accident Benefit Rider</li> <li>• AmMedic Flexi Plus Rider Plan 1</li> <li>• AmMedic Flexi Plus Rider Plan 2</li> <li>• AmMedic Flexi Plus Rider Plan 3</li> <li>• AmMedic Flexi Plus Rider Plan 4</li> <li>• Comprehensive Accident Indemnity Rider</li> <li>• Critical Illness Term Rider</li> <li>• Deferred Disability Income Rider</li> <li>• Dread Disease Waiver of Premium Rider</li> <li>• Hospitalisation Benefit Rider</li> <li>• Level Term Rider</li> <li>• Multi Critical Illness Shield Rider</li> <li>• Payor Benefit Rider</li> <li>• Payor Critical Illness Term Rider</li> <li>• Payor Dread Disease Waiver of Premium Rider</li> <li>• Payor Level Term Rider</li> </ul>
1	[Premium Term] Dropdown: • 5years, 10 years, 20 years

# 6. Sales Illustration

## 6.4 Plan - Preference for Secure Wealth

The screenshot shows the MetLife Malaysia MOS UI/UX Sales Illustration Plan module. At the top, there's a navigation bar with 'Sales Illustration' and 'Plan' tabs, and a status bar showing 'iPad' with signal, '10:33', and '41% battery'. Below the navigation is a toolbar with 'Basic Information', 'Select Product', 'Plan' (which is active), and 'Illustration' buttons. A dropdown menu shows 'Basic Plan' selected. On the left, there's a sidebar with 'Plan Code', 'Policy Term', 'Sum Assured (RM)', 'Payment Frequency', and a 'Riders' section listing 'CITLP', 'LTRLP', 'MCIPX', 'DWPWLP', and 'ABLP' with an 'Accident Benefit Rider' note. Premium options at the bottom include 'Yearly', 'Half Yearly', 'Quarterly', and 'Monthly'. A central modal window titled 'Preference' displays two radio button options: 'Leave with company to accumulate with interest' (selected) and 'Withdraw every year'. Below these are two checkboxes: 'Cash Value (CV) / Surrender Value (SV) Projection' (unchecked) and 'Target CV/SV' (unchecked). A 'Save' button is at the bottom right of the modal.

### Description

- \* 1.Guaranteed Cash Payment & Cash Dividend Option
- 2.Cash Value(CV) / Surrender Value (SV) Projection

# Plan - AmCapital

## 6. Sales Illustration

### 6.4 Plan - AmCapital

The screenshot shows the MetLife Malaysia MOS UI/UX Sales Illustration Plan screen. At the top, there's a header bar with icons for iPad, signal strength, time (10:33), battery level (41%), and language (English). Below the header is a navigation bar with tabs: Sales Illustration, Plan, Basic Information (green checkmark), Select Product (green checkmark), Plan (red exclamation mark), Illustration (red exclamation mark), Fund Type, Top Up, Preference, and Calculate.

The main form area has sections for Plan Code (ULSP5), Plan Name (AmCapital), Policy Term (60), Premium Term (60), and Single Premium (RM) (1). A red circle with the number 1 is placed over the Single Premium field. At the bottom, there are fields for Single Premium (RM) and Sum Assured (RM), and buttons for Back, Reference, Brochure, and a footer note.

Description	
*	<ul style="list-style-type: none"><li>• Plan for AmCapital.</li><li>• Option: Fund Type, Top Up, Preference.</li></ul>
*	Attachable Rider <ul style="list-style-type: none"><li>• None</li></ul>
1	[Single Premium(RM)] Text input: <ul style="list-style-type: none"><li>• Single Premium should be multiple of 1,000.</li></ul>

# 6. Sales Illustration

## 6.4 Plan - Preference for AmCapital

The screenshot shows the MetLife Malaysia MOS UI/UX Sales Illustration application interface. At the top, there is a header bar with icons for iPad, signal strength, time (10:34), battery level (41%), and language (English). Below the header, the main navigation bar includes 'Sales Illustration' (with a checkmark), 'Plan' (selected, indicated by a yellow background), 'Illustration' (with a warning icon), and other tabs like 'Basic Information' and 'Select Product'. A sub-navigation bar below shows 'Basic Plan' selected. In the center, there are buttons for 'Fund Type', 'Top Up', 'Preference', and 'Calculate'. On the left, there are fields for 'Plan Code' (ULSP5) and 'Plan Name' (AmCapital). A 'Policy Term' field shows '60'. A 'Single Premium (RM)' section is partially visible. A modal dialog box titled 'Preference' is open in the center. It contains a checkbox labeled 'Cash Value (CV) / Surrender Value (SV) Projection' which is checked. Below it are two input fields: 'Target CV/SV' and 'ANB', each with a corresponding input field below it. At the bottom of the dialog is a 'Save' button. At the very bottom of the screen, there are buttons for 'Back', 'Reference', and 'Brochure', along with a 'Single Premium (RM)' and 'Sum Assured (RM)' input field.

Description	
*	1.Cash Value(CV) / Surrender Value (SV) Projection

# Plan - AmMetLife SecureCare

## 6. Sales Illustration

### 6.4 Plan - AmMetLife SecureCare

The screenshot shows the AmMetLife SecureCare Sales Illustration Plan screen on an iPad. The top bar displays the device as an iPad with signal, time (10:35), battery level (41%), and language (English). The main header reads "Sales Illustration" and "Plan". Below the header, there are tabs: "Basic Information" (green checkmark), "Select Product" (green checkmark), "Plan" (yellow warning icon), and "Illustration" (red exclamation icon). A "Calculate" button is located on the right side of the input area.

**Basic Plan**

Plan Code	ALSC	Plan Name	AmMetLife SecureCare
Policy Term	55	Premium Term	55
Sum Assured (RM)		Yearly Premium (RM)	
Payment Frequency	Yearly		

Premium (RM): Yearly    Half Yearly    Quarterly    Monthly

Back    Reference    Brochure

Description	
*	<ul style="list-style-type: none"><li>• Plan for AmMetLife SecureCare.</li><li>• Option: None.</li></ul>
*	Attachable Rider <ul style="list-style-type: none"><li>• None</li></ul>

# Plan - AmMetLife Medic Flexi

## 6. Sales Illustration

### 6.4 Plan - AmMetLife Medic Flexi

The screenshot shows the AmMetLife Medic Flexi Sales Illustration Plan screen. At the top, there are tabs for Basic Information (green checkmark), Select Product (green checkmark), Plan (red exclamation mark), and Illustration (red exclamation mark). The Plan tab is selected. Below the tabs, it says "Basic Plan". On the right, there is a "Calculate" button. The form fields include:

- Plan Code: AMF1 (marked with a red circle and number 1)
- Plan Name: AmMetLife Medic Flexi
- Policy Term: 55
- Premium Term: 55
- Plan Option: AMF1 (marked with a red circle and number 2)
- Deductible Level: 0 (marked with a red circle and number 3)
- Yearly Premium (RM): (empty input field)
- Premium (RM): Yearly (dropdown menu)

At the bottom, there are buttons for Back, Reference, and Brochure.

Description	
*	<ul style="list-style-type: none"><li>• Plan for AmMetLife Medic Flexi.</li><li>• Option: None.</li></ul>
*	<ul style="list-style-type: none"><li>• Attachable Rider</li><li>• None</li></ul>
1	[Plan Code] Text Input: <ul style="list-style-type: none"><li>• Plan code is depend on Basic Plan selected</li></ul>
2	[Plan Option] Dropdown: <ul style="list-style-type: none"><li>• AMF1, AMF2, AMF3, AMF4</li><li>• AMF1 (may choose deductible level from 0, 2000, 5000, 10000, 15000)</li><li>• AMF2 (may choose deductible level from 0, 2000, 5000, 10000, 15000, 30000, 50000)</li><li>• AMF3 (may choose deductible level from 0, 2000, 5000, 10000, 15000, 30000, 50000)</li><li>• AMF4 (may choose deductible level from 0, 2000, 5000, 10000, 15000, 30000, 50000)</li></ul>
3	[Deductible Level] Dropdown: <ul style="list-style-type: none"><li>• 0, 2000, 5000, 10000, 15000, 30000, 50000</li><li>• List changes based on Plan Type</li></ul>

## 6. Sales Illustration

### 6.4 Plan - Fund Type Popup

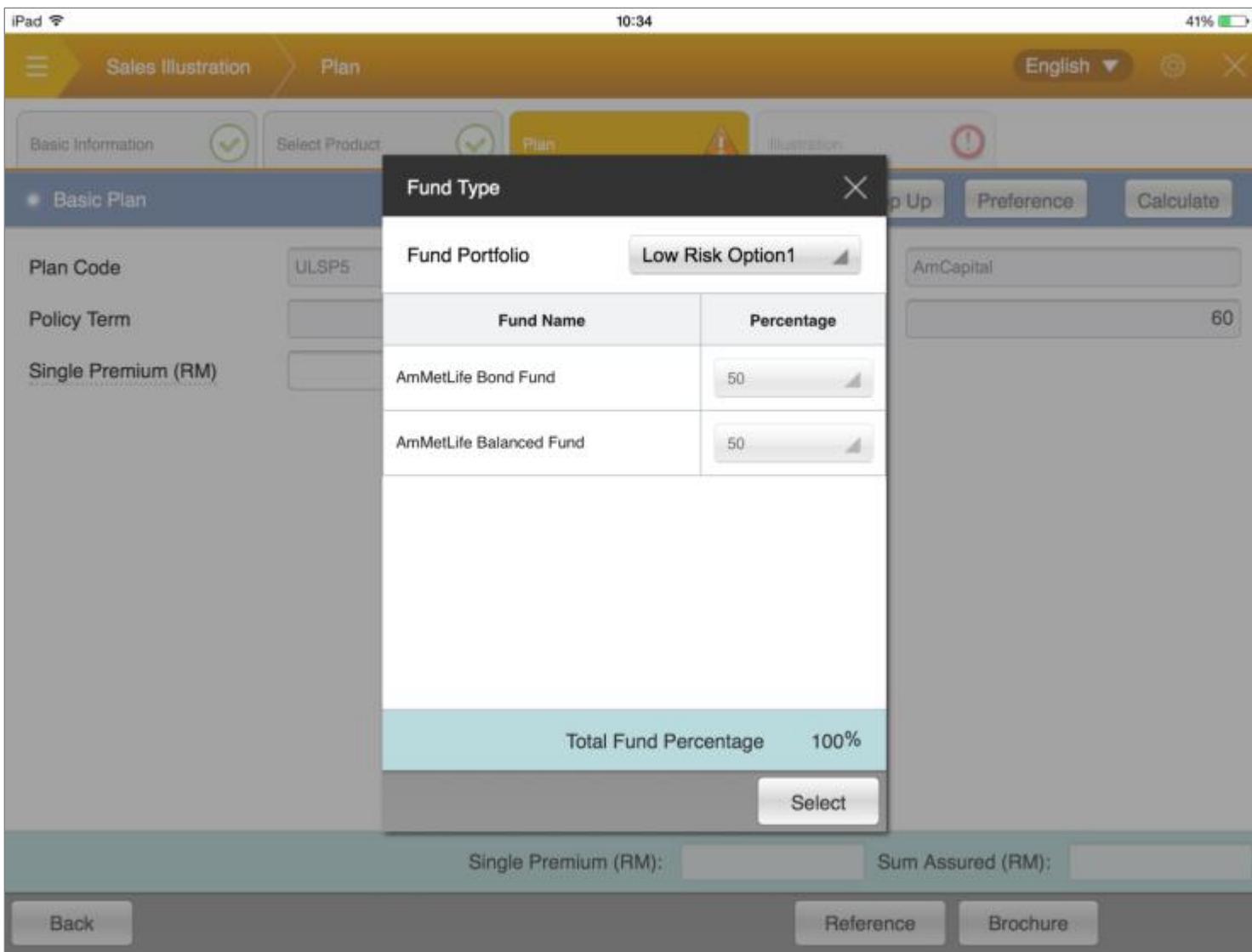
The screenshot shows the MetLife Malaysia MOS UI/UX Sales Illustration app interface. At the top, there's a navigation bar with 'Sales Illustration' and 'Plan' tabs. Below that, a sub-navigation bar shows 'Basic Information' and 'Select Product' steps completed. The main area displays 'Basic Plan' settings for 'Plan Code' (ULSP5) and 'Policy Term'. A central modal window titled 'Fund Type' is open, showing a dropdown menu for 'Fund Portfolio' (labeled 1), a table of funds with their percentages (labeled 3), and a 'Total Fund Percentage' input field set to 0% (labeled 2). At the bottom of the modal is a 'Select' button.

Fund Name	Percentage
AmMetLife Bond Fund	0
AmMetLife Tactical Bond Fund	0
AmMetLife Balanced Fund	0
AmMetLife Dana Teguh	0
AmMetLife Dividend Fund	0
AmMetLife Global Emerging Market	0

Description	
*	If I choose customize, the sequence for the Funds should from Low risk to High risk. If I completed CFFF risk profiling, and the result is high risk appetite, Funds Combination selection will filter accordingly. Just to show high risk option 1, 2, 3, 4 & Customize.
1	[Fund Portfolio] Dropdown: <ul style="list-style-type: none"><li>Low Risk Option1, Low Risk Option2, Medium Risk Option1, Medium Risk Option2, High Risk Option1, High Risk Option2, High Risk Option3, High Risk Option4, Customize</li><li>If coming from CFFF, list will be filtered based on appetite.</li><li>Fund will be listed based on fund portfolio except for customization to option.</li></ul>
2	[Total Fund Percentage]: <ul style="list-style-type: none"><li>Auto be calculated</li></ul>
3	[Percentage] Dropdown: <ul style="list-style-type: none"><li>0-100, interval 5</li><li>Enabled when Funds Combination is 'customize'.</li></ul>

## 6. Sales Illustration

### 6.4 Plan - Fund Type Popup - Case select Low Risk Option 1



#### Description

\* For predefined fund option, remaining fund will not be displayed

# 6. Sales Illustration

## 6.4 Plan - Top Up Popup

The screenshot shows the MetLife Malaysia MOS UI/UX Sales Illustration application on an iPad. The main screen displays a navigation bar with 'Sales Illustration' and 'Plan' tabs, and a language setting for 'English'. A central table is used for entering premium amounts for different years. A 'Calculate' button is visible on the right, showing a value of '60'. A 'Single Top Up' dialog box is overlaid on the screen, containing a 5x6 grid of input fields for years 1 through 30. At the bottom of the dialog are 'Reset' and 'Select' buttons, with the 'Reset' button highlighted by a red circle containing the number '1'. Below the dialog, there are fields for 'Single Premium (RM)' and 'Sum Assured (RM)'. At the bottom of the main screen are 'Back', 'Reference', and 'Brochure' buttons.

### Description

- |   |   |
|---|---|
| 1 | [Reset] Button:<br>• All amount text input are reset. |
|---|---|

## 6. Sales Illustration

### 6.4 Plan - Rider Information Popup

The screenshot shows the MetLife Sales Illustration app interface on an iPad. The top bar displays the device as an iPad with Wi-Fi, the time as 10:30, and battery level at 41%. The main navigation bar includes 'Sales Illustration' (with a checkmark), 'Plan' (with a checkmark), 'Basic Information' (with a checkmark), 'Select Product' (with a checkmark), 'Plan' (highlighted with a yellow background and an exclamation mark icon), 'Illustration' (with a red exclamation mark icon), 'Preference' (button), and 'Calculate' (button). Below this, under the 'Basic Plan' section, there are fields for 'Plan Code' (ALSB), 'Plan Name' (AmMetLife SecureBuilder), 'Plan Option' (Plan1), 'Policy Term' (15), 'Premium Term' (6), and 'Sum Assured (RM)' (60,000). A 'Riders' section is expanded, showing two selected riders: 'MCIPX' (Multi Critical Illness Shield Rider) and 'DWPX' (Dread Disease Waiver of Premium Rider). A modal window titled 'Multi Critical Illness Shield Rider Information' contains the text: 'This rider provides Critical Illness protection up to age 80 from seven (7) CI groups with a guaranteed lump sum benefit paid if you are diagnosed with any one of the Core Critical Illnesses, Tier 1 or Tier 2 (refer to the Benefits Schedule) during the term of the policy.' At the bottom, there are buttons for 'Back', 'Reference', 'Brochure', and 'Next'. A footer bar shows premium options: 'Premium (RM):' followed by 'Yearly' (14,280.15), 'Half Yearly' (7,282.95), 'Quarterly' (3,712.90), 'Monthly' (1,285.30).

Description	
*	Rider description message will be displayed

# 6. Sales Illustration

## 6.4 Plan - Tooltip for basic attribute

The screenshot shows the 'Sales Illustration' app interface on an iPad. The top bar displays 'iPad' with signal strength, '10:29', and '41%'. The main header has tabs for 'Sales Illustration', 'Plan', 'English', and a gear icon. Below the header, there are four status indicators: 'Basic Information' (green checkmark), 'Select Product' (green checkmark), 'Plan' (yellow warning triangle), and 'Illustration' (red exclamation mark). The 'Plan' tab is selected.

The 'Basic Plan' section contains the following fields:

- Plan Code: ALSB
- Plan Name: AmMetLife SecureBuilder
- Plan Option: Plan1
- Policy Term: 15
- Premium Term: 6
- Sum Assured (RM): 60,000
- Yearly Premium (RM): 14,148.60

A tooltip box is open over the 'Sum Assured (RM)' input field, displaying the text "Sum Assured (RM)" and "Minimum value: 20,000".

The 'Riders' section lists two riders:

	Code	Rider Name	Term	Sum Assured	Premium
<input type="checkbox"/>	MCIPX	Multi Critical Illness Shield Rider		<input type="text"/>	RM <input type="text"/>
<input type="checkbox"/>	DWPX	Dread Disease Waiver of Premium Rider		<input type="text"/>	RM <input type="text"/>

At the bottom, there are buttons for Premium (RM) selection: Yearly, Half Yearly, Quarterly, and Monthly. A 'Back' button is at the bottom left, and 'Reference' and 'Brochure' buttons are at the bottom right.

### Description

\* In case field input is required, tooltip for data entry will be shown in tooltip box.

# 6. Sales Illustration

## 6.4 Plan - Tooltip for rider

The screenshot shows the MetLife Malaysia MOS UI/UX Sales Illustration Plan screen. At the top, there are tabs for Basic Information, Select Product, Plan, and Illustration. The Plan tab is selected, indicated by a yellow background and a warning icon. Below the tabs, there are sections for Plan Code (ALSB), Plan Name (AmMetLife SecureBuilder), Plan Option (Plan1), Policy Term (15), Premium Term (6), Sum Assured (RM) (60,000), and Yearly Premium (RM). A 'Riders' section is expanded, showing a table of available riders. One row is highlighted with a tooltip: 'Multi Critical Illness Shield Rider'. The tooltip displays the 'Sum Assured' field, which is currently set to 60,000, with a note that the minimum value is 20,000 and the maximum value is 200,000. The table below lists other riders: MCIPX (Multi Critical Illness Shield Rider) and DWPX (Dread Disease Waiver of Premium Rider). At the bottom, there are buttons for Premium (RM) selection (Yearly, Half Yearly, Quarterly, Monthly) and navigation (Back, Reference, Brochure).

### Description

\* In case field input is required, tooltip for data entry will be shown in tooltip box. Rider with tooltip is indicated with underline.

# 6. Sales Illustration

## 6.5 Illustration - Table

The screenshot shows the MetLife Sales Illustration app on an iPad. The top navigation bar includes 'Sales Illustration' (highlighted with a green checkmark), 'Illustration' (highlighted with a green checkmark), 'Basic Information' (highlighted with a green checkmark), 'Select Product' (highlighted with a green checkmark), 'Plan' (highlighted with a green checkmark), and 'Illustration' (highlighted with a red exclamation mark). The main area displays 'Summary Information' for 'AmMetLife SecureBuilder' with a proposed life assured name 'CLIENT (ANB:25, Male, Non-smoker)'. A 'View Graph' button with a bar chart icon is circled with a red number '1'. At the bottom, there are 'Back' and 'Generate PDF' buttons, both circled with red numbers '2' and '3' respectively.

End of Policy Year (t)	GUARANTEED (Table A) (Basic and Riders, if any)				NON-GUARANTEED Total							
	Total Premium (Beginning Of Year)	Cash Value	Death Benefit	Guaranteed Annual Cash Payment payable	Total Premium (Beginning Of Year)	Cash Dividend		Guaranteed Annual Cash Payment Accumulated with Interest		Cash Dividend Accumulated with Interest		Termin. Payabl
						Scenario A	Scenario B	Scenario A	Scenario B	Scenario A	Scenario B	
1	14,148.60	0	80,400	600	131.55	0	0	600	600	0	0	0
2	14,148.60	0	79,800	600	131.55	328	223	1,229	1,219	328	223	0
3	14,148.60	5,412	79,200	600	131.55	748	507	1,890	1,856	1,093	737	0
4	14,148.60	15,022	78,600	600	131.55	1,132	766	2,583	2,514	2,278	1,526	0
5	14,148.60	25,247	78,000	600	131.55	1,605	1,083	3,310	3,192	3,995	2,656	0
6	14,148.60	35,203	76,200	1,800	131.55	2,118	1,423	5,272	5,090	6,309	4,162	0
7	0	0	0	0	0	0	0	0	0	0	0	0

### Description

- \* show table first before showing the graph.
- 1 [View Graph] Button:
  - Showing the graph.
- 2 [Back] Button:
  - Go back "Plan" tab.
- 3 [Generate PDF]:
  - Generate PDF of Sales Illustration.
  - After generate PDF, this button will be changed "View PDF" button.

# 6. Sales Illustration

## 6.5 Illustration - Graph

iPad 10:31 41%

Sales Illustration Illustration English

Basic Information Select Product Plan Illustration

**Summary Information**

Name of Product: AmMetLife SecureBuilder  
Proposed Life Assured Name: CLIENT (ANB:25, Male, Non-smoker)

**Graph**

Guaranteed Premium and Benefit

RM Policy Year

Policy Year	Total Premium [Beginning Of Year]	Cash Value	Death/TPD Benefit	Guaranteed Annual Cash Payment Payable
1	~15,000	0	~80,000	0
2	~15,000	0	~80,000	0
3	~15,000	~5,000	~80,000	0
4	~15,000	~15,000	~80,000	0
5	~15,000	~25,000	~80,000	0
6	~15,000	~35,000	~80,000	~2,000
7	0	~35,000	~75,000	~2,000
8	0	~38,000	~72,000	~2,000
9	0	~38,000	~70,000	~2,000
10	0	~38,000	~68,000	~2,000
11	0	~48,000	~65,000	~2,000
12	0	~48,000	~65,000	~2,000
13	0	~50,000	~63,000	~2,000
14	0	~50,000	~62,000	~2,000
15	0	~60,000	~62,000	~2,000

Total Premium [Beginning Of Year] Cash Value Death/TPD Benefit Guaranteed Annual Cash Payment Payable

Back 2 Customer Fact Find 3 View PDF

### Description

- |   |  |
|---|--|
| 1 | [View SIS Table] Button: <ul style="list-style-type: none"><li>Showing the table.</li></ul>  |
| 2 | [Customer Fact Find] Button: <ul style="list-style-type: none"><li>Defualt : hidden</li><li>After generate PDF, is visible</li><li>Go to "Customer Fact Find" page</li></ul> |
| 3 | [View PDF] Button: <ul style="list-style-type: none"><li>Show previous generated PDF.</li></ul>  |

## 6. Sales Illustration

### 6.5 Illustration - Case product does not have table information.

The screenshot shows the MetLife Sales Illustration application running on an iPad. The top status bar indicates the device is an iPad with signal, battery level at 42%, and the time is 10:41. The main header has tabs for 'Sales Illustration' (selected) and 'Illustration'. A language dropdown shows 'English'. Below the tabs are four status indicators: 'Basic Information' (green checkmark), 'Select Product' (green checkmark), 'Plan' (green checkmark), and 'Illustration' (orange exclamation mark). The 'Illustration' tab is currently active, displaying the error message: 'This product does not have table information.' The bottom navigation bar includes 'Back' and 'Generate PDF' buttons.

#### Description

*	Case product does not have table information.
---	---

## 6. Sales Illustration

### 6.5 Illustration - If client is unregistered

Summary Information

Name of Product: AmMetLife SecureBuilder

Proposed Life Assured Name: CLIENT (ANB:26, Male, Non-smoker)

Table (Consolidated Illustration)

End of Policy Year (t)	GUARANTEED (Table A) (Basic and Riders, if any)				NON-GUARANTEED Total								
	Total Premium (Beginning Of Year)	Cash Value	Death Benefit	Guaranteed Annual Cash Payment payable	Unregistered customers. Would you like to register a new customer?				Guaranteed Annual Cash Payment Accumulated with Interest		Cash Dividend Accumulated with Interest		Termin. Payabl
					No	Yes	Scenario A	Scenario B	Scenario A	Scenario B			
1	14,148.60	0	80,400	600	132.95	0	0	600	600	0	0	C	
2	14,148.60	0	79,800	600	132.95	328	223	1,229	1,219	328	223	C	
3	14,148.60	5,412	79,200	600	132.95	748	507	1,890	1,856	1,093	737	C	
4	14,148.60	15,022	78,600	600	132.95	1,132	766	2,583	2,514	2,278	1,526	C	
5	14,148.60	25,248	78,000	600	132.95	1,605	1,083	3,310	3,192	3,995	2,656	C	
6	14,148.60	35,204	76,200	1,800	171.75	2,118	1,423	5,272	5,090	6,309	4,162	C	
7	0	25,800	74,400	4,800	100.00	0.004	4,740	7,224	7,040	0.002	0.004	C	

Back Customer Fact Find View PDF

#### Description

- \* After generate PDF, If customer is unregistered, Ask to register customer.

# 6. Sales Illustration

## 6.5 Illustration - Profile is not linked

The screenshot shows the MetLife SecureBuilder Sales Illustration app interface on an iPad. The top navigation bar includes icons for Sales Illustration, Illustration, English language selection, and a settings gear. Below the navigation is a progress bar with four steps: Basic Information (checkmark), Select Product (checkmark), Plan (checkmark), and Illustration (checkmark). The main content area is titled "Summary Information". It displays the Name of Product as "AmMetLife SecureBuilder" and the Proposed Life Assured Name as "CLIENT (ANB:25, Male, Non-smoker)". A "View Graph" button with a bar chart icon is also present. A modal window titled "Create New Profile" is overlaid on the table. The modal has fields for "Profile Name" (empty) and a "Create" button. The table below is titled "NON-GUARANTEED Total Benefits (Basic Policy and Riders, if any)". It has columns for "Cash Dividend", "Accumulated with Interest", "Scenario A", and "Scenario B". The table contains 12 rows of numerical data. At the bottom are buttons for "Back", "Customer Fact Find", and "View PDF".

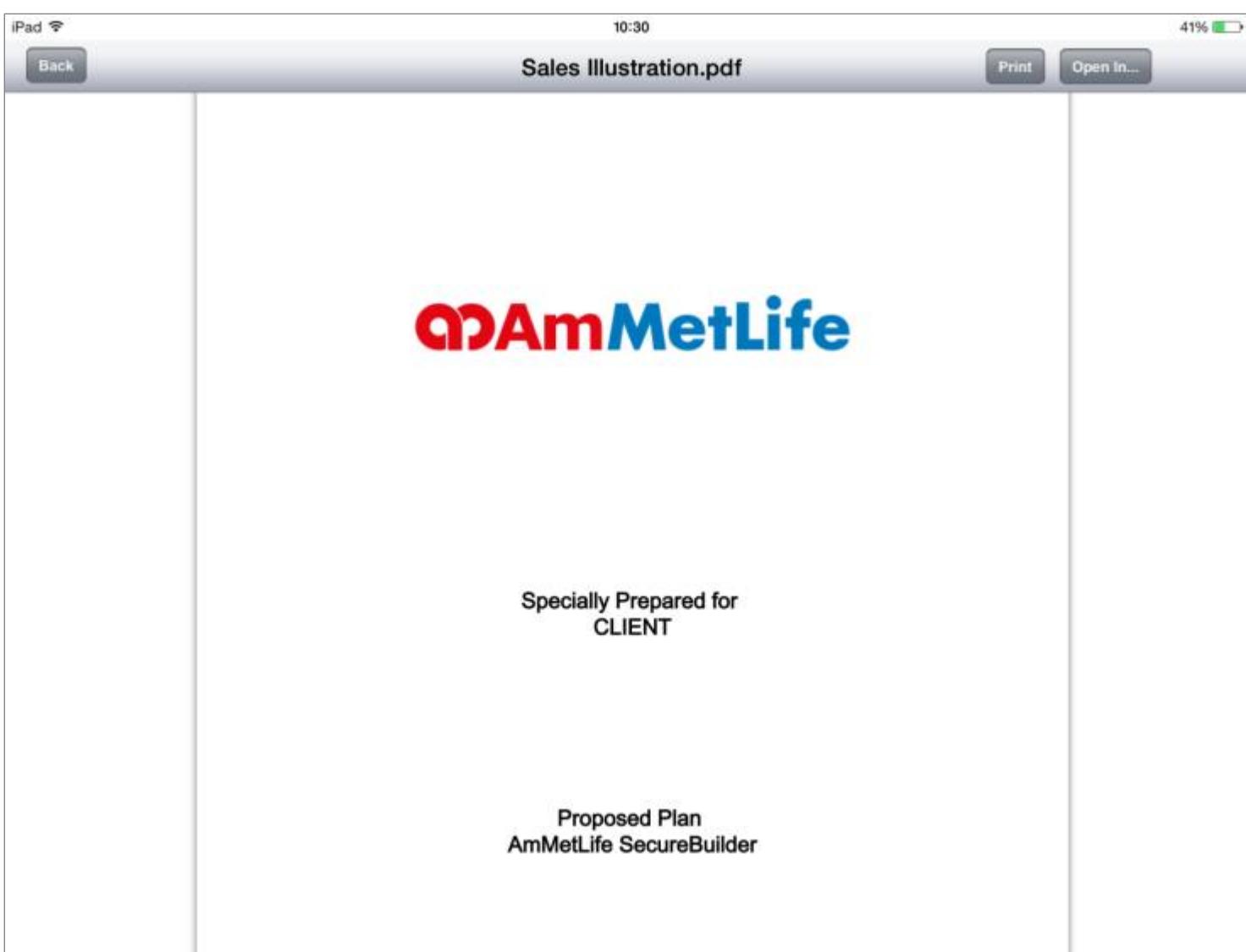
Cash Dividend	Accumulated with Interest	Scenario A	Scenario B	Benefit	Insured Age	End of Year						
18,849	11,924	9,783	4,656	37,837	32,710	0	0	108,649	95,756	111,766	98,873	35
22,360	13,971	11,143	5,499	29,464	23,820	0	0	115,296	100,138	117,331	102,174	36
26,034	16,062	12,494	6,327	28,333	22,166	0	0	121,413	103,813	123,173	105,573	37
29,878	18,197	13,837	7,141	27,147	20,450	0	0	127,827	107,593	129,306	109,072	38
33,901	20,377	15,171	7,940	25,902	18,671	0	0	134,551	111,482	135,743	112,675	39
37,959	22,508	16,496	8,723	16,496	8,723	12,483	5,603	138,334	113,168	142,347	116,288	40

### Description

\* After generate PDF, if there is no generated and linked Profile, this will be popped up.

## 6. Sales Illustration

### 6.6 Illustration PDF



Description	
*	Show sales illustration PDF.