

Certificate No. <input type="text"/>	New NRIC No. <input type="text"/> - <input type="text"/> - <input type="text"/>
Old NRIC/BC/Passport No. <input type="text"/>	
Name of Person Covered <input type="text"/>	

**Important Note :**

1. If you make a partial withdrawal from your certificate, it could affect the sustainability of your coverage until the end of its contractual term/maturity date. Great Eastern Takaful Berhad will send you a letter on Investment-linked Plan Partial Withdrawal Sustainability within five (5) working days if your certificate coverage is NOT sustainable up to its full contractual term/maturity date.
2. Before Great Eastern Takaful Berhad can process your withdrawal request, kindly submit the acknowledged Investment Linked Plan Partial Withdrawal Sustainability Letter to us.
3. The number of units to be transacted will depend on the unit price on the next available valuation date of the fund following Great Eastern Takaful Berhad's receipt of the acknowledgement letter, together with all required documents at its head office.
4. Please note that a partial withdrawal may lead to revocation of No-lapsed Facility provision in the certificate (if any). Please refer to your certificate document for more details.

**A. PARTIAL WITHDRAWAL**

Please tick the appropriate box:

**1. Ad Hoc Withdrawal**
☐ I would like to effect partial withdrawal as follows

Fund 01	i-Makmur Fund	:RM _____
Fund 02	i-Mekar Fund	:RM _____
Fund 03	i-Majmuk Fund	:RM _____
Fund 04	i-Ekuiti Global Fund	:RM _____
Other Funds	_____	:RM _____

(Please indicate amount in RM value\* or indicate "all value"\*\*)

- \* If the request is in RM value, the number of units to be withdrawn will be amount requested as the date of this application is received by Great Eastern Takaful Berhad.
- \*\* If the request is for "all Value", the amount to be withdrawn will be the value available as the date this application is received by Great Eastern Takaful Berhad.

**2. Auto Recurring Withdrawal (if applicable) \***

- ☐ Option 1 : Delete Auto Recurring Withdrawal request
- ☐ Option 2 : Maximum Withdrawal amount
- ☐ Option 3 : Partial Withdrawal by Amount\*\* RM \_\_\_\_\_

- \* Maximum frequency of once a year.
- \*\* The partial withdrawal amount must not exceeded the allocated Investment Booster amount.

I understand that :

- (a) Great Eastern Takaful Berhad reserves the right to reject my application should the amount be less than the limits set by the Takaful Operator.
- (b) THE BASIC SUM COVERED AND CRITICAL ILLNESS BENEFIT SUM COVERED (if applicable) may/may not be adjusted upon withdrawal from the Unit Funds (depending on the certificate conditions) and that the certificate will be endorsed accordingly.

**Great Eastern Takaful Berhad (916257-H)**

Head Office: Menara Great Eastern 303 Jalan Ampang 50450 Kuala Lumpur  
 Fax: +603 4259 8808 Customer Service Careline: 1 300 13 8338  
 E-mail: i-greatcare@greastertakaful.com Website: www.greastertakaful.com

## B. WITHDRAWAL FROM PARTICIPANT'S INDIVIDUAL ACCOUNT

☐ I would like to effect partial withdrawal as follows (if applicable)\*

RM \_\_\_\_\_

(Please indicate amount in RM value)

\* There may/may not be no minimum withdrawal amount and no minimum balance limit (depending on the certificate conditions) applicable, subject to availability of total account value balance in the Participant's Individual Account (PIA)

I understand that :

- (a) Great Eastern Takaful Berhad reserves the right to reject my application should the amount be less than the limits set by the Takaful Operator.
- (b) THE BASIC SUM COVERED AND CRITICAL ILLNESS BENEFIT SUM COVERED (if applicable) may/may not be adjusted upon withdrawal from the Unit Funds (depending on the certificate conditions) and that the certificate will be endorsed accordingly.

## C. DIRECT CREDIT FACILITY

For your convenience, we would like to credit the amount payable into your bank account. To enable us to do so, please fill in your bank account's required details.

I hereby authorize Great Eastern Takaful Berhad to credit the amount payable to me under the above certificate into this account:

The following bank account is under my name and the details are correct and I shall not hold Great Eastern Takaful Berhad for any damages, cost, losses or expenses that may arise as a result of this request.

NAME OF BANK:

BANK ACCOUNT HOLDER  
FULL NAME:

BANK ACCOUNT NO:

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## D. TAX RESIDENCY SELF-CERTIFICATION

Great Eastern Takaful Berhad (the "Takaful Operator") is required to collect information regarding the tax residency status of each Takaful Certificate Owner in order to comply with the Income Tax Act 1967 and the Income Tax (Automatic Exchange of Financial Account Information) Rules 2016 (collectively referred to as "Malaysian Laws on International Tax Compliance"). The Malaysian Laws on International Tax Compliance implement the standard for automatic exchange of financial account information in tax matters, commonly known as Common Reporting Standard ("CRS"), developed by the Organisation for Economic Co-operation and Development ("OECD").

Pursuant to the Malaysian Laws on International Tax Compliance, the Takaful Operator may be legally obliged to share the information provided by the Takaful Certificate Owner and other financial information with respect to the financial accounts of the Takaful Certificate Owner with the Inland Revenue Board of Malaysia ("IRBM"). IRBM may exchange such information with the tax authorities of another jurisdiction or jurisdictions in which the Takaful Certificate Owner may be a tax resident pursuant to an intergovernmental agreement to exchange financial account information.

Each jurisdiction has its own rules for defining tax residence. If you have any questions on how to determine your tax residency status or complete this form, you should consult your tax adviser or refer to the OECD automatic exchange of information portal at <http://www.oecd.org/tax/transparency/automaticexchangeofinformation.htm>. The Takaful Operator will not be in a position to provide assistance beyond the information set out herein.

Note: For takaful contract which provides cash value or an annuity, the Takaful Certificate Owner may be any person:-

- (a) who has entitlement to the cash value; or
- (b) has the authority to change the beneficiary named in the certificate; or
- (c) named as the owner in the certificate; or
- (d) with a vested entitlement to receive payment under the terms of the certificate

Notwithstanding the above, upon maturity of the takaful contract which provides cash value or annuity, the person entitled to received payment under the certificate shall be treated as the Takaful Certificate Owner.

#### D. TAX RESIDENCY SELF-CERTIFICATION

**Note: To be fill in by Person Covered aged 18 years old and above for Surrender /Partial Withdrawal application under 3rd party certificate.**

☐ Person Covered

Are you currently a tax resident outside Malaysia?

- ☐ No, I am currently solely a tax resident in Malaysia and do not have any foreign tax residency.
- ☐ Yes, I am currently a tax resident in the following list of countries/jurisdictions (please include Malaysia if applicable).

Please complete the following table indicating.

- (i) Where the Person Covered/Proposer/Participant is tax resident and  
(ii) The Person Covered's/Proposer's/Participant's TIN for each country/jurisdiction indicated.

If a TIN is unavailable please provide the appropriate reason **A, B or C** where indicated below:

**Reason A** - The country/jurisdiction where the Takaful Certificate Owner is resident does not issue TINs to its residents

**Reason B** - The Takaful Certificate Owner is otherwise unable to obtain a TIN or equivalent number  
(Please explain why you are unable to obtain a TIN in the below table if you have selected this reason)

**Reason C** - No TIN is required.  
(Note. Only select this reason if the domestic law of the relevant jurisdiction does not require the collection of the TIN issued by such jurisdiction)

No	Country of tax residence	Tax Identity No (TIN)	If no TIN available enter Reason A, B or C	Reason why you are unable to obtain a TIN (Please fill if B is selected)
1				
2				
3				
4				
5				

#### E. DATA PROTECTION NOTICE

For information on how we process your personal data and your rights over your personal data, kindly refer to our Personal Data Protection Notice posted at [greateasterntakaful.com](http://greateasterntakaful.com).

If you have any inquiry or complaint (such as limiting the processing of certain information, including the withdrawal of consent to receive marketing information), you may contact our **Customer Service Careline** at 1300-13-8338, or write to the Takaful Operator at [i-greatcare@greateasterntakaful.com](mailto:i-greatcare@greateasterntakaful.com)

## F. DECLARATION AND AUTHORISATION BY CERTIFICATE OWNER

I/We certify that I/We am/are the Takaful Certificate Owner for the family takaful application to which this form relates. Where the Person Covered is a minor, I/We certify that I/We am/are authorised to act for and on behalf of the Person Covered in my/our capacity as the legal guardian of the Person Covered.

I/We acknowledge that the information contained in this form, including information regarding the Takaful Certificate Owner and any reportable account(s) may be reported to IRBM and exchanged with the tax authorities of another country or countries in which the Takaful Certificate Owner may be a tax resident, pursuant to intergovernmental agreements to exchange financial account information.

I/We declare that all statements made in this form are, to the best of my/our knowledge and belief, correct and complete. I/We undertake to inform the Takaful Operator within 30 days if there is any change in circumstances that affects the tax residency status of the Takaful Certificate Owner or causes the information contained herein to become incorrect or incomplete. I/We shall provide the Takaful Operator with an updated self-certification form within 90 days of such change in circumstances.

I/We understand that any person who provides any incorrect information required to be provided under the Malaysian laws of International Tax Compliance shall (unless the person can show that such incorrect information was provided in good faith) be guilty of an offence which is punishable with a fine not less than RM20,000 and not exceeding RM100,000, or imprisonment for up to six (6) months or both.

Dated at \_\_\_\_\_ 

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Day Month Year

\_\_\_\_\_  
Signature of Certificate Owner

Name \_\_\_\_\_

NRIC No. \_\_\_\_\_

Tel No. \_\_\_\_\_

### PLEASE NOTE :

- (a) The payment for the actual amount payable shall be issued only after the unit price is available.
- (b) Signature(s) of the Certificate Owner and/or persons giving consent on this form should be similar to the signature in our records.
- (c) The Company requires a photocopy of the Identity Card/Passport of the Certificate Owner (Where Applicable).
- (d) Direct Credit facility is only applicable to banks participating in the Interbank GIRO (IBG) payment system in Malaysia.
- (e) The Partial withdrawal value will be paid to the Person Covered as 'Hibah', subject to the Person Covered's age is 18 years old and above. Otherwise, it will be paid to the Certificate Owner.
- (f) Withdrawal from Participant's Unit Account (PUA) for selected product is allowed starting from the second Certificate year onwards. Please refer to certificate for the terms and conditions.
- (g) Withdrawal from PUA of i-Saver Rider first and followed by PUA of Basic Plan (if applicable).