



Upon completion, please submit to:-
Agency Department

Email: Agency_Admin@aig.com

REQUEST FORM FOR TRANSFER OF BUSINESS PORTFOLIO (AGENT TO AGENT)

Part A - To be completed by Incumbent Agent

Incumbent Agent : _____	Producer Code : _____
Branch : _____	BDM-In-Charge : _____

Appointed Agent : _____	Producer Code : _____
Branch : _____	BDM-In-Charge : _____

1. State the reason for the transfer of business portfolio.

2. State the reason for appointing the above agent to take over your business portfolio.

Signature & Company Stamp (if applicable)

Date

Important Notes

- (i) The request for transfer is subject to the Company's approval. In the event that the request is rejected, the decision is taken as final and no appeal will be entertained
- (ii) If the request for transfer is approved, the appointed agent will be notified. However, in any case, the letter of appointment from the Insured will take priority and supercede any assignment of policy to the appointed agent
- (iii) If the request for transfer is approved, the incumbent agent should cease and desist from handling the Insured directly in all aspects of the sales and serving process as it may contravene Sub-Agency regulation
- (iv) The Company reserves the right to assign partial or all policies to other agents, as its sole discretion, without notification to the incumbent or appointed agent

Part B - To be completed by Appointed Agent

Service Standard and Best Practices

As a selected agent to receive assignment, you must fulfill the following **service deliverables**:

(A) Service to The Customer:

- Contact the customer as soon as possible from the date of assignment notification, without any undue delay
- Deliver all relevant assignment documents (if any) to the customer as soon as possible, without any undue delay
- Conduct a policy review with the customer (where applicable) upon your meeting with the customer

(B) Service to The Company (AIG):

- Inform the respective department immediately, should there be any change of particulars of customer or the policy
- Inform Agency Department immediately should there be any customer service concern raised by the customer

As a professional sales representative of AIG, you are advised to observe the following **best practices**:

(A) Decorum:

- Professional Dress Code - Business wear (with tie for men) at least for initial meeting with customer
- Bilingual Effectiveness - Speaks fluent English & 1 other local language (Mandarin, Tamil or Malay)
- Effective Presentation Skills - Can effectively conduct a public presentation or personal review
- Punctuality - Punctuality in meeting/following up with customer
- Pleasant Disposition

(B) I.T. Proficiency:

- Active Email Account - Possess an active email account & has frequent use of it
- Personal Laptop - Possess a personal laptop & uses it for electronic communication (email)
- Personal AIG Email Address - Possess an active AIG email account & has it printed on personal name card

-----**DECLARATION**-----

I/We hereby declare that I/We:

- Read and understood the above service deliverables and best practices and will endeavour to comply with the service deliverables and best practices
- Will keep all information pertaining to any assignment private and confidential
- Understand that a letter of appointment from the customer will supercede any assignment of policy to me/us
- Understand that the Company reserves the right to assign partial, or all policies under the incumbent agent to other agents, at its soles discretion, without notification to me/us
- Understand that the Company reserves the right to disqualify me from taking on any further assignment of policies should my performance is found lacking or if there is a change to prevailing qualification criteria on assignment of policies or transfer of business portfolio
- Understand that the Company reserves the right to conduct random surveys/checks with the Insured on my/our level of professional service rendered
- Will handle the Insured directly in all aspects of the sales and servicing process so as not to contravene any Sub-Agency regulation

Signature of Appointed Agent & Company
Stamp (if applicable)

Date

For Official Use (To be completed by Agency Officer)

Personal file records of the Appointed Agent:

- No unfavourable personal file records
- Unfavourable personal file records, eg.
 - (i) Complains
 - (ii) Poor Conduct or Disciplinary issues
 - (iii) Violations, Breaches of Rules and Regulations

If any unfavourable personal file records, briefly describe:

Approval of Business Development Manager (BDM)

(A) BDM of Incumbent Agent : _____

Accepted Rejected

Remarks: _____

Signature

Date

(B) BDM of Appointed Agent : _____

Accepted Rejected

Remarks: _____

Signature

Date