

For adviser to complete

PS Code: \_\_\_\_\_

**Seminar:** \_\_\_\_\_ **Date:** \_\_\_\_\_

We would greatly appreciate if you could kindly take a few moments to complete this form, your feedback will help us improve our future seminars and services to you.

Full Name (as per NRIC/Passport): \_\_\_\_\_ Email Address: \_\_\_\_\_  
Address: \_\_\_\_\_ Postal Code: \_\_\_\_\_  
Telephone: (Mobile) \_\_\_\_\_ (Home) \_\_\_\_\_  
Invited By (Adviser's Name): \_\_\_\_\_ Existing PIAS Client:  Yes  No

1. Did you find the venue convenient and suitable?  
 Yes  No
2. How did you find the seminar topic and its relevance to you?  
 Yes  No
3. How would you rate the duration of the event?  
 Excellent  Good  Satisfactory  Poor
4. Would you like to review your financial portfolio?  Yes  No

I would like to know more about (tick where applicable)

- |  |   |
|--|---|
| <input type="checkbox"/> Medical Protection            | <input type="checkbox"/> Estate Planning                  |
| <input type="checkbox"/> Risk Insurance Planning       | <input type="checkbox"/> Trust and Wills                  |
| <input type="checkbox"/> Children's Education Planning | <input type="checkbox"/> Mortgage and Refinancing         |
| <input type="checkbox"/> Investment Planning           | <input type="checkbox"/> Taxation Planning                |
| <input type="checkbox"/> Retirement Planning           | <input type="checkbox"/> CPF Minimum Sum Scheme (Annuity) |

**I am interested in making an appointment to discuss my financial situation and the most convenient day & time would be:**

\_\_\_\_\_

Any other comments: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

## Personal Data Notice and Consent Clause

- I understand, acknowledge and consent to PIAS processing, collecting and using my personal data provided by me in this form and from time to time, to PIAS and disclosing my personal data to Permitted Parties for the following Purposes:
  - administering, servicing or dealing with the financial advisory services provided by PIAS (including processing your applications for financial products);
  - managing with your financial products that you have purchased pursuant to the financial advisory services provided by PIAS;
  - observing any legal, governmental or regulatory requirements of any relevant jurisdiction (including any disclosure or notification requirements to which PIAS is subject to); and
  - carrying out due diligence, monitoring or other screening activities in accordance with PIAS' legal or regulatory obligations or risk management procedures.
  - providing me with marketing, advertising and promotional information, materials and/or documents relating the financial advisory services provided by PIAS (including the financial products of PIAS' business partners and product providers) that PIAS may be selling, marketing, offering or promoting (whether such products or services exist now or are created in the future) which in the opinion of PIAS may be of interest or benefit to me, by way of postal mail and electronic transmission to my email and postal address(es).\*

For withdrawal of consent for marketing via email and/ or postal mail, please contact PIAS Data Protection Officer for more information at [pias.dataprotection@singlife.com](mailto:pias.dataprotection@singlife.com).

2.  **(Please tick ✓ the box if you wish to provide your consent)**

By ticking the box, I hereby consent PIAS to collect and use my personal information to provide me with marketing, advertising and promotional information, materials and/or documents relating the financial advisory services provided by PIAS (including the financial products of PIAS' business partners and product providers) that PIAS may be selling, marketing, offering or promoting (whether such products or services exist now or are created in the future) which in the opinion of PIAS may be of interest or benefit to me, by way of telephone calls, SMS/MMS and facsimile to me, to the telephone number(s) provided by me to PIAS in this form and any other telephone number(s) provided by me to PIAS from time to time.

I understand that if my consent is not provided, PIAS will be unable to provide me with such marketing and promotional information using such modes of communication.\*

- I hereby represent and warrant that I am the user and/or subscriber of all the telephone number(s) provided by me to PIAS from time to time (including without limitation the telephone number (s) provided by me to PIAS in this consent form and on all other forms, or documents from time to time), and that I have read and understood PIAS' Personal Data Notice and Consent Policy and the above provisions.
- I understand, acknowledge and consent to PIAS using photos taken at this event which may reflect my identity for publication in PIAS collateral and publicity purpose.

\* For details about PIAS' Personal Data Notice and Consent Policy, please visit <https://www.proinvest.com.sg/pdpa>.

\_\_\_\_\_

Date: \_\_\_\_\_

**Client's Signature**

**For Internal Use:**

Received by PIAS	On	By
	Date & Time:	Officer: